Symposium Call Center Server

Platform Migration Guide

Product release 4.0 | Standard 1.0 | November 2000

NORTEL NETWORKS™

P0918378

Symposium Call Center Server

Platform Migration Guide

Product release:	4.0
Document release:	Standard 1.0
Date:	November 2000

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Printed in the United States of America

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Publication history

November 2000 The *Symposium Call Center Server Platform Migration Guide* for Release 4.0 is issued as Standard 1.0.

Contents

1 Getting started 1

Overview. 2
About Symposium Call Center Server 3

2 Migrating to another platform 5

Migration procedure overview 6
Preparing for migration. 15
Collecting original server information 17
Worksheets for collecting original server information. 34
Platform migration procedure. 38
Preparing the new server. 39
Configuring the new server. 44
Changing the disk drive letter assignment on the new server. 46
Installing the Symposium Call Center Server software 50
Adjusting the swap file 59
Backing up the database of the original server. 69
Restoring the original platform database to the new platform 70
Completing the migration. 77

Glossary 79

Index 103

Chapter 1

Getting started

In this chapter

Overview 2

About Symposium Call Center Server 3

Overview

Introduction

This guide provides the procedures you must perform to migrate to another server platform that uses the same Release 4.0 of Symposium Call Center Server as your present platform.

This chapter introduces Symposium Call Center Server and describes how the call center components interact with one another.

Who should read this guide

This guide is intended for Nortel Networks installers and distributors who are responsible for installing or upgrading Symposium Call Center Server.

Access rights

This guide assumes that you have the privileges and access rights required to perform the procedures in this guide. For more information, refer to the *Administrator's Guide*.

Optional features

Some features described in this guide are optional. To give you access to features, Nortel Networks supplies a special code called a keycode, which you use when you install Symposium Call Center Server software. Fields and commands for features that you did not purchase are not available.

About Symposium Call Center Server

What is Symposium Call Center Server?

Symposium Call Center Server provides a call center solution for varied and changing business requirements. It offers a suite of applications that includes

- call processing
- agent handling
- management and reporting
- networking (for Meridian 1 systems only)
- third-party application interfaces

Symposium Call Center Server uses a client/server architecture, which distributes call routing and management capabilities among processors to make the best use of system resources.

The components of Symposium Call Center Server

Symposium Call Center Server uses a client/server architecture, with functionality distributed among various components. Symposium Call Center Server includes the following major components:

- **the server PC**—Responsible for functions such as the logic for call processing, call treatment, call handling, call presentation, and the accumulation of data into historical and real-time databases. This PC runs under Microsoft Windows NT Server 4.0.
- **the client PCs**—A graphical user interface to the server. Client PCs run the Symposium Call Center Server client application. They are used to administer the server and to monitor call center performance. You can connect client PCs to either the embedded LAN (ELAN) or customer LAN (CLAN). Nortel Networks recommends connecting to the CLAN as this is more predictable and less susceptible to fluctuations resulting from data bursts in CLAN traffic.
- **the switch**—Provides telephony services and voice network connectivity.
- **front-end IVR system**—(Optional) Provides voice processing capabilities.

- **third-party applications**—(Optional) Use information from the server to provide information on screens (“screen pops”) or produce customized reports.

Chapter 2

Migrating to another platform

In this chapter

Migration procedure overview 6
Preparing for migration 15
Collecting original server information 17
Worksheets for collecting original server information 34
Platform migration procedure 38
Preparing the new server 39
Configuring the new server 44
Changing the disk drive letter assignment on the new server 46
Installing the Symposium Call Center Server software 50
Adjusting the swap file 59
Backing up the database of the original server 69
Restoring the original platform database to the new platform 70
Completing the migration 77

Migration procedure overview

Introduction

Platform or server migration is a process whereby the data residing on a server's hard disk is copied onto a second server. The primary reasons to perform a platform migration are

- in the event of a hardware failure
- to change to a different server with increased capacity

This process allows you to remove a server from the network and immediately replace it with another server.

Server requirements

To perform platform migration, you must back up the database information from the original server, prepare the new server so that it can operate in a manner similar to the original server, and restore the data to the new server. In Symposium Call Center Server Release 4.0, you can restore the database backup tape to a newly created database on a new Meridian Application Server or Platform Vendor Independence server platform.

Supported servers

Symposium Call Center Server supports the following server platforms:

- Meridian Application Server (MAS). This is the same platform as supported by earlier releases of Symposium Call Center Server.
- Platform Vendor Independence (PVI). This can be any platform such as a third-party Windows NT server that meets Nortel Networks' minimum recommended hardware requirements.

The following platform-to-platform migration paths are supported by Symposium Call Center Server Release 4.0:

Original platform	New platform
1000t	1000t
1000t	701t
1000t	702t
1000t	1001t
1000t	1003t
701t	701t
701t	1000t
701t	702t
701t	1003t
702t	702t
702t	1003t
1001t	1001t
1001t	1003t
1003t	1003t
Legacy (any of the above)	Platform Vendor Independence (third-party Windows NT) server
Platform Vendor Independence (third-party Windows NT) server	Platform Vendor Independence (third-party Windows NT) server

Migration from a 702t to a 1001t is not supported since the 2 Gbyte drive D of the 1001t is smaller than the 4 Gbyte drive D of the 702t. It is not possible to migrate a larger database to a smaller one.

To perform a migration to a Platform Vendor Independence server, the new Platform Vendor Independence server must have the same or a greater number of drive partitions that contain the database device files as the original server. As well, the drive partitions must be the same size or larger than the original server. For an example, see “Checking the disk partition configuration” on page 21.

The platform migration procedure is also applicable to the following supported platforms running a Symposium Call Center Server Network Control Center (NCC) server type with a Release 3.0 or higher release:

NCC server types

Original NCC platform	New NCC platform
1001t	1001t
1001t	1003t
1003t	1003t
Legacy (any of the above)	Platform Vendor Independence (third-party Windows NT) server (Release 4.0 only)
Platform Vendor Independence (third party Windows NT) server	Platform Vendor Independence (third-party Windows NT) server (Release 4.0 only)

Assumptions

The platform migration process is based on the following assumptions:

- Both original and new Symposium Call Center Server platforms are running the exact same software release and Performance Enhancement Package (PEP) level.
- Both original and new Symposium Call Center Server platforms are running the same version of the operating system. Procedures in this document are written for Windows NT Server 4.0.

- The new platform must be installed with the exact same configuration and setup as the old platform, including the following elements:
  - computer name
  - keycode
  - M1 serial number (or DMS/MSL dongle number)
  - site name
  - network IP setup for both ELAN and CLAN
  - switch name
  - switch IP address
  - voice connectivity
  - company name
  - customer name

  In the case of migration to a Platform Vendor Independence platform for Symposium Call Center Server Release 4.0, the keycode will be different but must have the same purchased features and system limits.
- For migration from legacy MAS platforms to Platform Vendor Independence servers, the new server must have an additional partition available. For example, if the original server has drives C, D, F, and G, the new server must have drives C, D, F, G, and H. For details, see “Checking the disk partition configuration” on page 21.
- All drives on the new platform must be partitioned to the standard size as documented. The partitioned drive size on the new server should be approximately the same as or larger than the original server. (The new drive size can be slightly smaller than that on the original server.)
- For legacy servers, the total free disk space of the new drive D after Windows NT installation should have sufficient space to hold the total file size sum of all Symposium Call Center Server software files and database files on the original server drive D.
- The new platform must be installed with a tape drive and corresponding driver software that is compatible with the database backup tape from the original platform during the migration process. After a successful migration, the tape drive and its driver software can be replaced with the supported type for the new platform.
- The latest database backup- and restore-related PEPs for the corresponding release must be applied to the new and original platform.

- The database backup feature must be functioning on the original platform.
- To perform platform migration, the installer must have advanced technical knowledge of
  - the Microsoft Windows NT operating system
  - Symposium Call Center Server hardware installation and maintenance for the hardware platforms involved
  - Symposium Call Center Server installation and maintenance

Swap file location

On platforms converted from Release 1.x to Release 3.0, and from legacy hardware for Release 1.x to legacy hardware for Release 4.0, the swap file is moved from the default location on drive D to the first available drive. In most cases, this is drive F. The reason for this move is as follows:

- On platforms running Release 1.x, there is not enough free space on drive D, so the move of the swap file from drive D results in more free space on this drive.
- On platforms that are migrating in Release 3.0 or Release 4.0 that have previously been converted from Release 1.x, in the case of migrating to the same size platform, you must retain the swap file on the same drive as it was on the original platform.

Conversion from Release 1.x to Release 3.0 or Release 4.0 and platform migration

Two separate steps are involved when converting from Release 1.x to Release 3.0 or Release 4.0 and migrating to a more powerful platform. The following guidelines will help you to determine which step to perform first.

Migrating to a larger size platform

If you want to migrate from, for example, a 2 Gbyte first physical drive server to a 4 Gbyte first drive server, perform the conversion to the new Symposium Call Center Server release on the original server first, and then migrate to the new server. This ensures that there is more free disk space on the new server. In this case, the swap file on the new server remains on drive D.

Migrating to the same size platform

If you want to migrate from, for example, a 4 Gbyte first physical drive server to another 4 Gbyte first drive server, perform the platform migration to the new server first, and then perform the conversion to the new Symposium Call Center Server release. Since the new server is usually faster, the conversion process finishes sooner on the new server. This is a key element since there is usually a limited amount of downtime available to complete this task. As part of the conversion process, the swap file is moved off drive D.

Note: You must upgrade an original MAS platform running Release 3.0 to Release 4.0 before performing a platform migration to a Platform Vendor Independence system.

Migration from regular MAS platform to Platform Vendor Independence platform

Ensure that the Platform Vendor Independence server is installed with an Release 4 keycode that specifies the platform type as PVI, and that it has the same serial number, purchased feature set, and system limits as the original MAS platform.

Platform migration not supported

The following type of platform migration is not supported:

- Platform Vendor Independence to Meridian Application Server

Before you begin

To ensure that you have all the information you need to complete the Platform Migration procedures, do the following before you begin platform migration:

- Follow the steps in the Migration checklist.
- Follow the instructions in the “Preparing for migration” and “Collecting original server information” sections, and complete the worksheets in the “Worksheets for collecting original server information” section.

Note: The following procedures assume that the original and new servers are running Windows NT Server 4.0. If the original server is running Windows NT Server 3.51, procedures for the original server may vary.

Check Installation Addendum

When performing a platform migration, check the Installation Addendum on your regional Symposium Call Center Server technical web site. North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/nic.

Migration checklist

The following major steps are required to perform the platform migration:

Description	✔
Prepare the materials for migration. See “Preparing for migration” on page 15.	
Use the migration utility to collect the original server’s setup record and database configuration to a Platform Recovery Disk. See “Collecting information from the Migration Utility” on page 18.	
Record the disk partition configuration. See “Checking the disk partition configuration” on page 21.	
Record the Windows NT version. See “Checking the Windows NT version” on page 25.	
Record the RAM size. See “Checking RAM size” on page 26.	
Record the location and size of the swap file. See “Checking the swap file location” on page 27.	
Record the Symposium Call Center Server software version. See “Checking the Symposium Call Center Server software version” on page 30.	

Description	✔
Record the PEP level applied. See “Checking the PEP level applied” on page 32.	
Configure the new server in exactly the same way as the original server. See “Configuring the new server” on page 44.	
Prepare the new server using the Platform Recovery Disk. This places the original server’s setup record and database configuration on the new server. See “Installing the Symposium Call Center Server software” on page 50.	
Install the same version of the Symposium Call Center Server software on the new server as on the original server. **ATTENTION** The configuration parameters must match on both servers. See “Installing the Symposium Call Center Server software” on page 50.	
Update the new server to the same PEP level as the original server. See “Installing the Symposium Call Center Server software” on page 50. **Note:** PEPs are available on your regional Symposium Call Center Server PEP web site. (North American customers refer to the web site at www.nortel-sccs.com. European customers refer to the Symposium Call Center Server area on the web site at www.nortelnetworks.com/TSC_EUROPE.)	
Perform a database backup on the original server. See “Backing up the original platform database” on page 67.	
Save the SystemRecord table from the new server database to a SystemRecord backup disk. See “Restoring the original platform database to the new platform” on page 70. **Note:** The SystemRecord table contains hardware-specific information for the new server and must be restored after the original server database is migrated to the new server.	

Description	✔
Restore the database backup from the original server to the new server. See “Restoring the original platform database to the new platform” on page 70.	
Restore the SystemRecord table from the SystemRecord disk to the new server. See “Restoring the original platform database to the new platform” on page 70.	
Verify the integrity of the database. See “Restoring the original platform database to the new platform” on page 70.	
Complete the migration. See “Completing the migration” on page 77.	

Preparing for migration

Introduction

You need to have the following materials available before starting the migration process:

- blank tapes or data cartridges
- two blank preformatted disks
- Symposium Call Center Server software
- the latest available PEP
- a tape drive and associated driver software. The tape drive installed on the new server must be compatible with the tape drive on the original server running Symposium Call Center Server.

Required materials

Blank tapes/data cartridges

During the platform migration, you need blank tapes to store the original server's database using the database backup procedure. The blank tape must be of the correct type for the tape drive on the original server; the tape capacity must be large enough to contain the database backup.

Blank disks

You need two blank preformatted disks

- to create a Platform Recovery Disk that contains the original server's setup record and database configuration
- to store the new server's SystemRecord table

Symposium Call Center Server software

Platform migration requires that the new server be installed with the same version of the Symposium Call Center Server software as is installed on the original server. For Symposium Call Center Server Release 4.0, this includes the following installation disks:

- Server CD-ROM containing
  - Symposium Call Center Server installation software
  - PVI Minimal Configuration Compliance Check utility
- Server Supplementary CD-ROM containing
  - any additional software components required for Symposium Call Center Server to operate, such as performance enhancement packages (PEPs)
- Platform Support CD-ROM containing
  - pcAnywhere 9.2
  - Microsoft Windows NT Server 4.0 Service Pack 6a
  - Adobe Acrobat Reader 4

Tape drive and associated drive software

If the new server is equipped with a tape drive that is incompatible with that of the original server, remove the new server's tape drive and install a compatible tape drive and driver software.

Notes:

- The tape drive replacement is temporary and required for the migration procedure only. Save the new server's tape drive and its driver software disks for reinstallation into the new server.
- If you are borrowing the tape drive from the original server, replace the tape drive on the new server after the original server database has been backed up.

You might also need adapters to connect the tape drives. For information on replacing a tape drive, refer to the maintenance guide for your hardware platform.

Collecting original server information

Introduction

The new server must use the same base configuration information as the original server. This section shows you how to obtain the required information from the original server before starting the platform migration process.

You can divide the information gathering into eight parts:

1. collecting information from the Migration Utility
2. checking the disk partition configuration
3. checking the Windows NT version
4. checking the computer name
5. checking the RAM size
6. checking the swap file location and size
7. checking the Symposium Call Center Server software version
8. checking the PEP level applied

Before you begin

Perform the following tasks before you begin to collect information from the original server:

- Check the Installation Addendum for Migration on your regional Symposium Call Center Server technical web site.
- Ensure the latest available PEPs are applied to the original server. The PEPs include the Platform Migration Utilities and the Backup and Restore Utilities.

Collecting information from the Migration Utility

You can gather some of the required information using the Migration Utility as shown in this section. You might also have gathered the information during the installation of the original server, as shown in the *Software Installation and Maintenance Guide.*

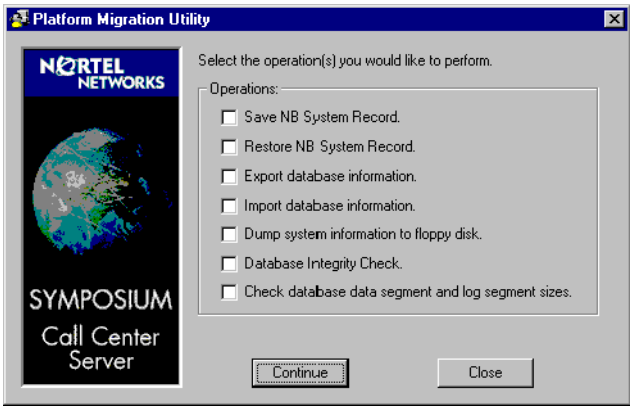
To collect information from the Migration Utility

To gather the original server's setup record and database configuration to a disk, follow these steps.

1 Log on to the original server as NGenSys.

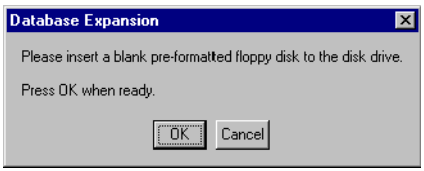
2 From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

Result: The Platform Migration Utility dialog box appears.



3 Select the Export database information function. The Dump system information to floppy disk function is automatically selected. Click Continue.

Result: The following dialog box appears:

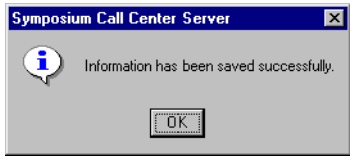


4 Insert a blank preformatted disk into drive A, and then click OK.

Result: Files containing the original server's setup record and database configuration are exported to the disk. The following dialog box appears:

5 Click OK.

Result: The following dialog box appears:



6 Click OK.

Result: The following dialog box appears:

7 Remove the disk from drive A, label it "Platform Recovery Disk," and click OK to exit the migration utility.

8 Keep the Platform Recovery Disk in a safe place.

Platform Recovery Disk

The Platform Recovery Disk contains the file MigInfo.txt, which includes the following information about the original server:

M1 Symposium Call Center Server

- keycode
- M1 serial number

- installed computer name
- current computer name
- site name
- M1 Switch name
- M1 Switch IP address
- M1 Switch customer group number
- M1 Switch type
- Server ELAN IP address
- Server CLAN IP address
- Server RSM IP address
- Server TCP/IP hostname
- Server TCP/IP protocol setup (that is, gateway, subnet mask, and so on)
- Voice Connectivity

DMS/MSL Symposium Call Center Server

- keycode
- Nortel Networks software feature key serial number
- installed computer name
- current computer name
- site name
- DMS/MSL Switch name
- DMS/MSL Switch IP address
- DMS/MSL Network Node
- DMS/MSL Application ID
- DMS/MSL Service ID
- DMS/MSL Service Version
- DMS/MSL Business Group
- DMS/MSL Linkset Name
- DMS/MSL Password
- Server ELAN IP address
- Server CLAN IP address

- Server RSM IP address
- Server TCP/IP hostname
- Server TCP/IP protocol setup (that is, gateway, subnet mask, and so on)
- Voice Connectivity

NCC Symposium Call Center Server

- keycode
- M1 serial number
- installed computer name
- current computer name
- site name
- Server ELAN IP address
- Server CLAN IP address
- Server TCP/IP hostname
- Server TCP/IP protocol setup (that is, gateway, subnet mask, and so on)

Note: The Platform Recovery Disk contains important information for system recovery and platform migration if needed in the future.

Checking the disk partition configuration

The new server must have the same or greater number of logical disk drive partitions as the original server. To perform a migration to a Platform Vendor Independence server, the new Platform Vendor Independence server must have the same or a greater number of drive partitions that contain the database device files as the original server. Also, the drive partitions must be the same size or larger than the original server. If you are migrating from a MAS server to a Platform Vendor Independence server, the new server requires an extra drive partition.

Example 1

If, for instance, you are migrating from a MAS server to a Platform Vendor Independence server, and the original MAS server has only drive C and drive D, the original database is located in drive D. The new Platform Vendor Independence server must have the database beginning in drive F, so the partitions are for drive C, D, and F. (Drive E is the CD-ROM drive in this example).

Original MAS drive	New Platform Vendor Independence drives and partitions
C	C (Win NT 4.0, pcAnywhere)
D (database)	D (Symposium Call Center Server)
	F (database)

Example 2

If the original MAS server has drives C, D, F, and G, the database partitions are for drives D, F, and G (three database partitions). In this case, the new Platform Vendor Independence server has a minimum of drives C, D, F, G, and H. The database partitions are for drives F, G, and H (three database partitions).

Original MAS drive	New Platform Vendor Independence drives and partitions
C	C (Win NT 4.0, pcAnywhere)
D (database)	D (Symposium Call Center Server)
F (database)	F (database)
G (database)	G (database)
	H (database)

Example 3

In the case of a migration from an existing Platform Vendor Independence server to a new Platform Vendor Independence server, the new Platform Vendor Independence server should have at least as many partitions as the original server. If the original Platform Vendor Independence server has partitions C, D, F, and G, then the new Platform Vendor Independence server must have at least partitions C, D, F, and G. Additional new partitions can be used.

Original Platform Vendor Independence drives and partitions	New Platform Vendor Independence drives and partitions
C (Win NT 4.0, pcAnywhere)	C (Win NT 4.0, pcAnywhere)
D (Symposium Call Center Server)	D (Symposium Call Center Server)
F (database)	F (database)
G (database)	G (database)

The logical disk drive letter assignment of partitioned disks on the new server depends on the server type. For drive letters, see the appropriate installation or configuration guide for the type of server to which you are migrating (Meridian Application Server or Platform Vendor Independence).

ATTENTION

A new MAS server from Nortel Networks is configured with drive E as the CD-ROM drive. A Platform Vendor Independence server from a vendor might use a different drive letter for the CD-ROM drive, which may need to be changed to drive E. Refer to the *Platform Vendor Independence Base Configuration Guide* for details.

Partitioning 4 Gbyte and 9 Gbyte hard drives

When you partition a server with a 4 Gbyte hard drive for Platform Vendor Independence, there are less than 4096 Mbytes of drive space left due to the header size used for the extended partition. In this case, the PVI Compliance Check utility that you run after the installation process may indicate a non-compliant condition as it looks for a minimum drive space of 4096 Mbytes. If there are 4080 Mbytes or more of space available, you can safely ignore this

warning. You may encounter the same problem if you partition a larger hard drive (for example, if you split a 9 Gbyte hard drive using two 4 Gbyte partitions). For additional Platform Vendor Independence partitioning details, including those for the Nortel Networks 702t and 1003t servers, see the *Symposium Call Center Server Platform Vendor Independence Base Configuration Guide*.

To check the disk partition configuration on the original server

1 From the Windows Start menu, choose Programs → Administrative Tools → Disk Administrator.

2 Record the following on the "Disk partition configuration worksheet" on page 34:

- the displayed disk number
- the logical disk drive letter assignments
- the size of each partitioned disk

3 Ensure that the new server has the disk partitions configured according to its server type.

The following table presents an example only of disk partition configuration:

Disk number	Disk drive letter assignment	Disk partition size
Disk 0	C	4086 Mbytes NTFS
Disk 0	D	4086 Mbytes NTFS
CD-ROM 0	E	539 Mbytes CDFS
Disk 1	F	4086 Mbytes NFTS

Note: You must correct any noncompliant disk partition configuration on the new server, either by repartitioning the disk drive, reassigning drive letters, or replacing the server with a new platform that meets the requirements. See the maintenance guide for your hardware platform.

Checking the Windows NT version

Before you install the new server with Symposium Call Center Server software, make sure the new platform is installed with the same version of the Windows NT operating system as the original server. Symposium Call Center Server Release 4.0 software works with Windows NT Server 4.0 only. If needed, repartition all drives and reinstall the operating system again in the new server. See the maintenance guide for your hardware platform.

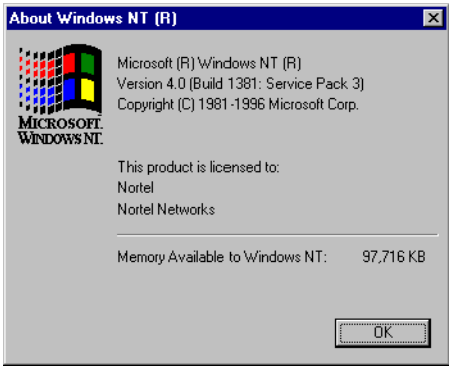
To check the Windows NT version on the original server

1 Right-click the Windows Start menu and choose Explore.

2 In the Explorer window, choose Help → About Windows NT.

Result: The About Windows NT dialog box appears.

3 Record the Windows NT version and service pack version on the “Windows NT version worksheet” on page 35.


About Windows NT (R)
Microsoft (R) Windows NT (R)
Version 4.0 (Build 1381: Service Pack 3)
Copyright (C) 1981-1996 Microsoft Corp.
MICROSOFT WINDOWS NT
This product is licensed to:
Nortel
Nortel Networks
Memory Available to Windows NT: 97,716 KB
OK

4 Click OK.

Checking the computer name

By default, a new server is installed with a dummy computer name. When you prepare the new server for platform migration, you must change the dummy computer name to the Installed Computer Name of the original server. (The Installed Computer Name might not be the same as the Current Computer Name of the original server.)

Notes:

- After you complete the platform migration, change the computer name to match the Current Computer Name of the original server. For more information, refer to the *Software Installation and Maintenance Guide*.
- The computer name is case-sensitive. Ensure that the computer name used on the new platform is exactly the same as the name on the old platform.

To check the installed computer name

1. On the original server, insert the Platform Recovery Disk into the floppy drive A.
2. From the Windows Start menu, choose Run.
3. Type **notepad A:\MigInfo.txt**, and then click OK to open the MigInfo.txt file.
4. Record the Installed Computer Name and Current Computer Name on the “Computer name worksheet” on page 35.

Checking RAM size

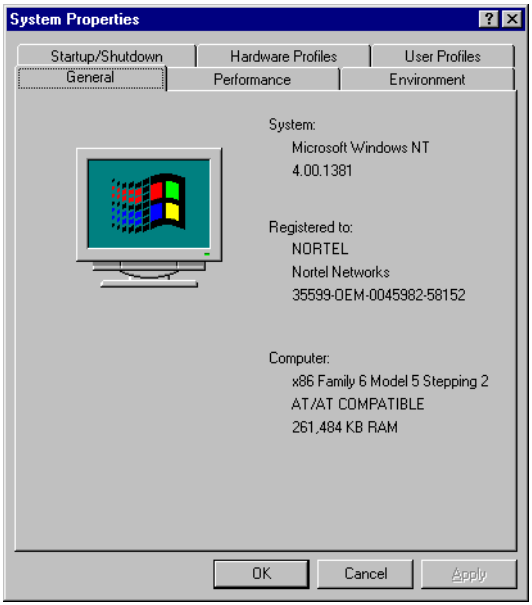
The total physical RAM of the new server must meet the requirements for the server type, and it must be at least as large as the RAM on the original server.

To check the RAM size on the original server

1. From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

   Result: The System Properties property sheet appears, with the General tab displayed.

2 Record the RAM size on the “RAM size worksheet” on page 35.



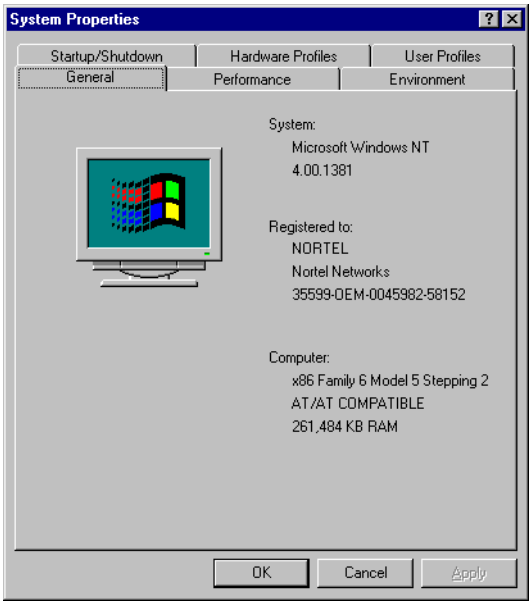
Checking the swap file location

The swap file on a new Platform Vendor Independence platform should be on drive C, and it should be at least the size of RAM plus 11 Mbytes. The swap file on a new MAS platform might be on drive C or D, depending on the size of the drive. For this reason, you need to check the location and size of the swap file when migrating from a MAS platform to another MAS platform.

To check the swap file location and size on the original server

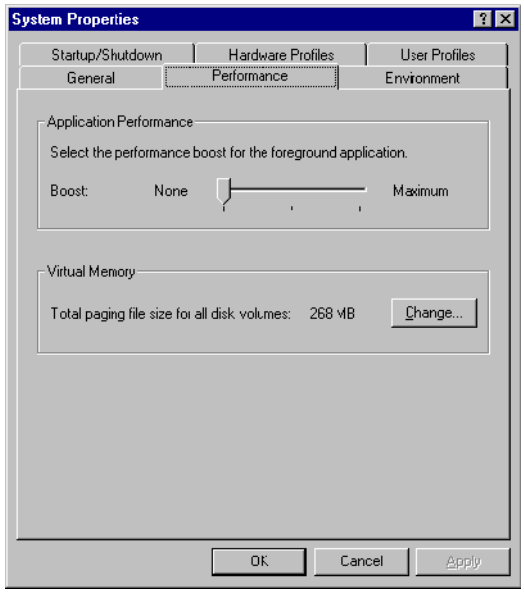
1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties property sheet appears.



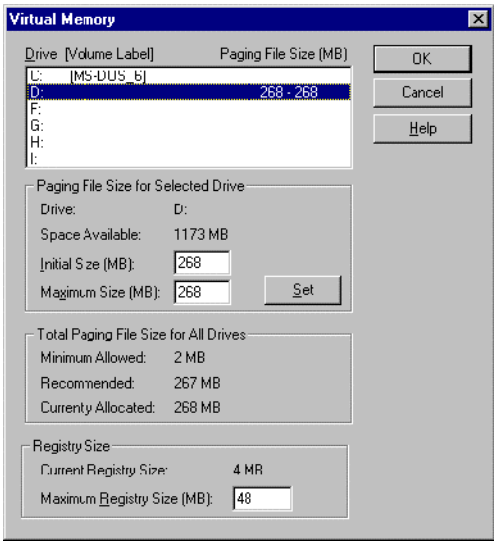
2 Click the Performance tab.

Result: The Performance property page appears.



3 Click Change in the Virtual Memory section.

Result: The Virtual Memory dialog box appears.



4 Record the disk location and size of the swap file or paging size (for example, drive D, 268 Mbytes) on the “Swap file location worksheet” on page 35.

5 Click Cancel to exit the Virtual Memory dialog box.

6 Click Cancel to exit the System Properties property sheet.

7 Close the Control Panel window.

Checking the Symposium Call Center Server software version

The new server must have the same software release version as the original platform.

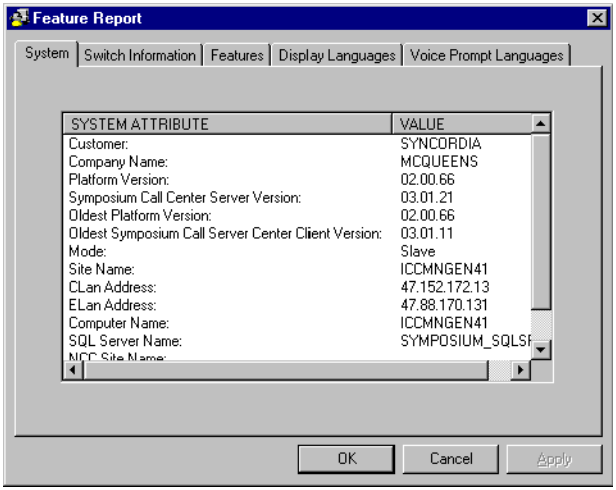
To check the Symposium Call Center Server software version on the original server

1 On the original server, from the Windows Start menu, choose Programs → Symposium → Symposium Call Center Server → Feature Report.

2 Click the System tab.

3 Record the platform version and Symposium Call Center Server version on the “Symposium Call Center Server software version worksheet” on page 36.

4 Ensure that you obtain the correct version of the software CDs for installation on the new server.



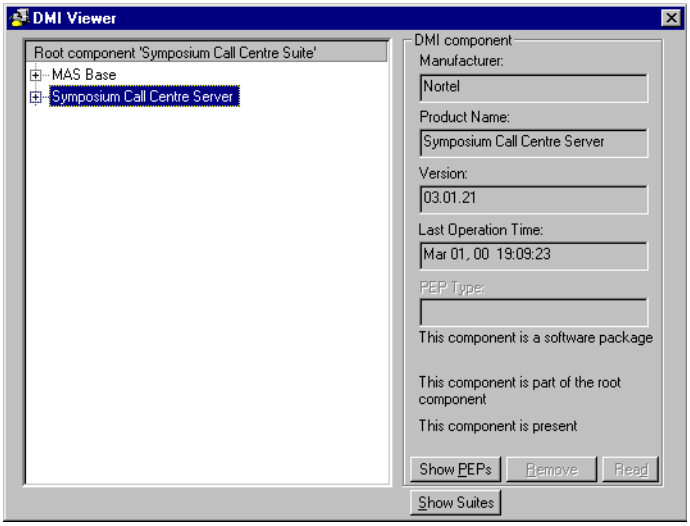
Checking the PEP level applied

You must install the new server with the same PEP level as the original server.

To check the PEP levels on the original server

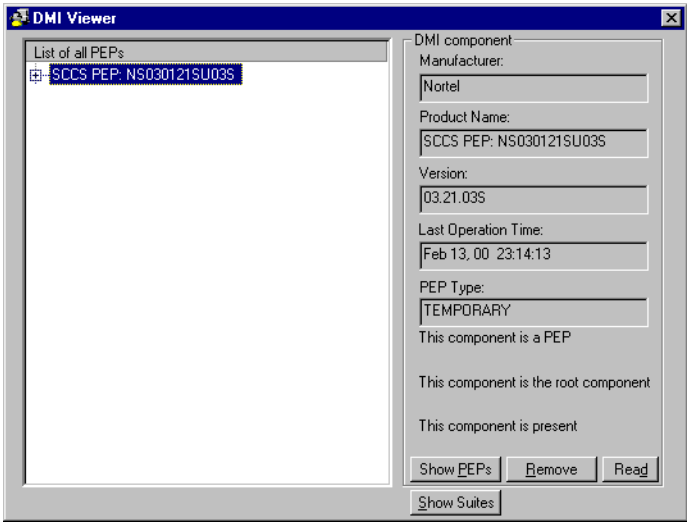
1 On the original server, from the Windows Start menu, choose Programs → Symposium → Symposium Call Center Server → DMI_View.

Result: The DMI Viewer appears.



2 Click the Show PEPs button.

Result: The List of all PEPs appears.



3 Click each displayed PEP on the list of PEPs. Record the PEP Product Name, PEP Version, and PEP Type in the DMI Component area for each PEP on the “PEP level worksheet” on page 36.

Worksheets for collecting original server information

Introduction

Make photocopies of these worksheet pages and use them to record original server information for platform migration.

Disk partition configuration worksheet

Disk number	Disk drive letter assignment	Disk partition size

Windows NT version worksheet

Item	Fill in the required information
Windows NT version	
service pack version	

Computer name worksheet

Item	Fill in the required information
Installed Computer Name (that is, the Original Computer Name)	
Current Computer Name	

RAM size worksheet

Item	Fill in the required information
RAM size	

Swap file location worksheet

Item	Fill in the required information
Swap file logical disk location	
Swap file or paging size	

Symposium Call Center Server software version worksheet

Item	Fill in the required information
Platform Version	
Symposium Call Center Server Version	

PEP level worksheet

Item	Fill in the required information
PEP Product Name	
PEP Version	
PEP Type	
PEP Product Name	
PEP Version	
PEP Type	
PEP Product Name	
PEP Version	
PEP Type	
PEP Product Name	
PEP Version	
PEP Type	
PEP Product Name	
PEP Version	
PEP Type	

Item	Fill in the required information
PEP Product Name	
PEP Version	
PEP Type	

Platform migration procedure

Introduction

This platform migration procedure applies to all supported migration paths. The procedure enables the original server to continue functioning until the new server is ready to be put into service.

You can divide the platform migration procedure into seven parts:

1. preparing the new server
2. configuring the new server
3. installing the Symposium Call Center Server software
4. adjusting the swap file, if necessary
5. backing up the old platform database
6. restoring the old platform database to the new platform
7. completing the migration

If the call center continues to respond to calls using Symposium Call Center Server after the database backup, then some call pegging data will be missing between the database backup of the original server and the restored database of the new server. If you must transfer pegging data to the new server, Nortel Networks recommends that

- you take the original server out of service before the database backup and that it remain out of service during the entire migration procedure
- the customer collects all of the needed call statistic and pegging data from the original server's database before the server is taken out of service

Preparing the new server

Introduction

Before you install the new platform with Symposium Call Center Server software, check that it is installed with the correct and same version of DOS (legacy platforms only) and Windows NT Server operating system as the original platform. If needed, repartition the disks, and reinstall the operating system and pcAnywhere software on the new server.

For legacy MAS platforms, run a full set of diagnostics on the new platform, using the diagnostic disk shipped with the platform. Resolve all detected hardware errors before installing Symposium Call Center Server software.

If the new server is not a fresh server shipped from Nortel Networks manufacturing or from your own server vendor, and it already has a version of Symposium Call Center Server installed, repartition all disks and reinstall the operating system and pcAnywhere again. The process of uninstalling Symposium Call Center Server alone might not remove all extra files (such as PEP files and trace files) from the server. If the new server is fresh from Nortel Networks or from your own server vendor, it might come with only the primary disk configured. You might need to install and partition additional disks before installing the Symposium Call Center Server software.

To change the minimum password length

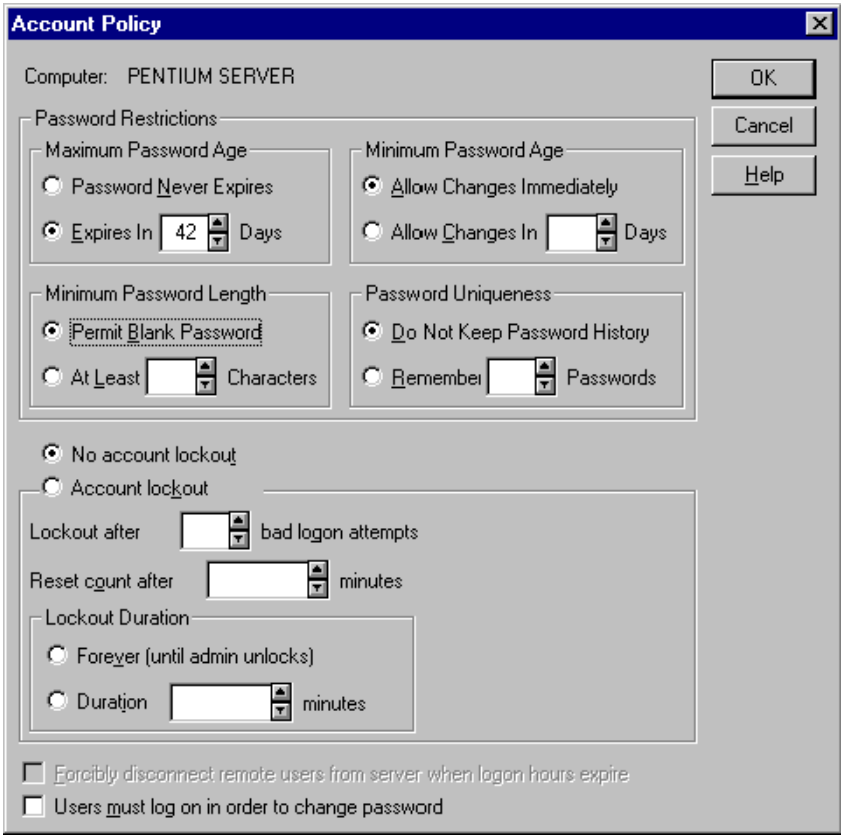
Windows NT Server 4.0 must allow the four-character temporary password “ngen” to be created when Symposium Call Center Server is installed. Use this procedure to change the minimum password length.

1 Click Start > Programs > Administrative Tools (Common) > User Manager for Domains.

Result: The User Manager window appears.

2 On the Policies menu, click Account.

Result: The Account Policy dialog box appears.



3 If the Minimum Password Length has been previously set to any length, click Permit Blank Password.

4 Click OK.

Result: The User Manager window appears.

5 Exit the User Manager window.

Disk partition configuration

The new platform must meet the following disk configuration:

MAS to MAS migration

The new server must have the same or greater number of logical disk drive partitions as the original server. For a MAS to MAS migration, the logical disk letter assignment of all partitioned disks on the new server must match the original server. Any additional partitioned disk drive on the new server must be assigned to the next higher logical drive letter. For example, if the original MAS server has C, D, F, and G drive assignments to the four partitioned drives, the new MAS server must also have C, D, F, and G assigned to the first four drive partitions. Any additional drives on the new server should be assigned drive letters H and I, if needed.

Original MAS drives	New MAS drives
C	C
D (database)	D (database)
F (database)	F (database)
G (database)	G (database)

The partitioned size of each disk drive on the new server should be approximately the same as or larger than the corresponding drive on the original server. In practice, the new server drive can be slightly smaller than the original server drive. For non Disk 0 drives (drives C and D), Nortel Networks recommends that the new server disk size should not be smaller than 98 percent of the corresponding drive on the original server. For example, if the original server drive F size is 4102 Mbytes, the new server drive F size should not be smaller than 4096 Mbytes.

Migration to Platform Vendor Independence

To perform a migration to a Platform Vendor Independence server, the new Platform Vendor Independence server must have the same or a greater number of drive partitions that contain the database device files as the original server. Also, the drive partitions must be the same size or larger than the original server.

Example 1

If, for instance, you are migrating from a MAS server to a Platform Vendor Independence server, and the original MAS server has only drive C and drive D, the original database is located in drive D. The new Platform Vendor Independence server must have the database beginning in drive F, so the partitions are for drive C, D, and F. (Drive E is the CD-ROM drive in this example).

Original MAS drives	New Platform Vendor Independence drives and partitions
C	C (Win NT 4.0, pcAnywhere)
D (database)	D (Symposium Call Center Server)
	F (database)

Example 2

If the original MAS server has drives C, D, F, and G, the database partitions are for drives D, F, and G (three database partitions). In this case, the new Platform Vendor Independence server has a minimum of drives C, D, F, G, and H. The database partitions are for drives F, G, and H (three database partitions).

Original MAS drives	New Platform Vendor Independence drives and partitions
C	C (Win NT 4.0, pcAnywhere)
D (database)	D (Symposium Call Center Server)
F (database)	F (database)
G (database)	G (database)
	H (database)

Example 3

In the case of a migration from an existing Platform Vendor Independence server to a new Platform Vendor Independence server, the new Platform Vendor Independence server should have at least as many partitions as the original server. If the original Platform Vendor Independence server has partitions C, D, F, and G, then the new Platform Vendor Independence server must have at least partitions C, D, F, and G. Additional new partitions can be used.

Original Platform Vendor Independence drives and partitions	New Platform Vendor Independence drives and partitions
C (Win NT 4.0, pcAnywhere)	C (Win NT 4.0, pcAnywhere)
D (Symposium Call Center Server)	D (Symposium Call Center Server)
F (database)	F (database)
G (database)	G (database)

The logical disk drive letter assignment of partitioned disks on the new server depends on the server type. For drive letters, see the appropriate installation or configuration guide for the type of server to which you are migrating (Meridian Application Server or Platform Vendor Independence).

Correct any non compliant disk partitioning configuration on the new server by repartitioning the disk drive, reassigning drive letters, or replacing the server with a new platform that meets the requirements.

Swap file location

For Release 3.0 and 4.0 systems running on legacy hardware, if migrating to an identical size platform (specifically the drive D partition size), place the swap file on the new platform on the same drive letter as the original platform. If you are migrating to a larger size platform, the swap file can remain on drive D on the new platform.

Configuring the new server

To configure the new server

1. If the new platform is equipped with a tape drive that is incompatible with the tape drive on the original server, then remove the tape drive and install a compatible drive and its driver software on the new platform. See the maintenance guide for your hardware platform.

   Note: If you are moving the original tape drive to the new platform, ensure that the database backup of the original platform is complete before you remove the drive. See “Backing up the original platform database” on page 67.

2. Ensure that the new platform is disconnected from the network of the original platform (both ELAN and CLAN). The new platform should remain disconnected from the network until the migration procedure is completed.

3. Ensure that the new platform is installed with the correct version of operating system (NT 4.0 with the recommended service pack for Symposium Call Center Server Release 4), and all disks are installed and partitioned properly depending on the server type.

4. Ensure that the new platform is installed with the correct RAID administration utility. The RAID software is platform-specific and is installed differently for each platform.

5. Ensure that the computer name on the new server is the same as the Installed Computer Name for the original server. See “Checking the computer name” on page 25. If you need to change the computer name of the new server, see “To change the computer and workgroup names” in the *Software Installation and Maintenance Guide.*

   Notes:

   - The computer name is case-sensitive. Ensure that the computer name used on the new platform is exactly the same as the name used on the old platform.
   - If the computer name on the original server was changed after the Symposium Call Center Server software was installed, use the Installed Computer Name for this step. After you complete the platform migration, change the computer name to match the Current Computer Name of the original server. For more information, refer to “Computer Name Sync” in the *Software Installation and Maintenance Guide*.

6 Ensure that the LAN network cards are set up with the same network IP configuration (for example, IP address, subnet mask, default gateway, and so on) as on the original server. Compare to the TCP/IP parameter information in the MigInfo.txt file of the Platform Recovery Disk.

Note: It is important that the new platform be disconnected from the network of the original platform (both ELAN and CLAN) before making the IP configuration change; otherwise, a duplicate IP error can occur and stop the original platform from normal operation.

7 Check and verify that the new server's disk configuration is set properly for the type of server. (See "Checking the disk partition configuration" on page 21.) To reassign drive letters on the new server, see the installation/ configuration guide for that server. To reassign drive letters on a new MAS server, see "Changing the disk drive letter assignment on the new server" on page 46.

8 For migrations to new Platform Vendor Independence platforms, make sure the Virtual Memory allocation (swap file) on the new server is 11 Mbytes larger than the RAM size. To set the swap file size on the new server, see the *Symposium Call Center Server Platform Vendor Independence Base Configuration Guide*.

9 Restart the new server to activate all the changes (computer name, network IP configuration, and so on).

Note: It is normal for the Windows NT operating system to disable the network card if it is disconnected from the network. Ignore this warning and continue with the migration procedure.

Changing the disk drive letter assignment on the new server

Use the following procedures when migrating from a MAS server to another MAS server, and the drive letter assignments on the new server do not match that of the original server.

To check the drive letter assignment

1. On the new server, from the Windows Start menu, choose Programs → Administrative Tools → Disk Administrator.
2. If the disk administrator has never been run before, click OK to allow it to update the system configuration.
3. For any new disks in the system, the Disk Administrator warns you that there is no signature on the disk. Click OK to allow the signature to be written to disk. You must repeat this step for each new disk in the system.
4. Check whether the hard drives on the new server have the same drive letter assignments that match the original server.
5. If the drive letter assignments match, exit the Disk Administrator by selecting Partition → Exit from the Disk Administrator window.
6. If the drive letter assignments do *not* match, complete the next procedure to reassign the drive letters on the new server to the drive letter assignments on the original server.

To change the drive letter assignment

Note: Disk Administrator will not let you reassign a hard drive to a drive letter that is currently in use by another drive. You must first assign each hard drive to a temporary drive letter and restart the server before the drive letters can be reset to the correct order.

1. Assign the CD-ROM drive to the last available drive letter as follows:
   a. In the Disk Administrator window, select Tools → Assign CD-ROM Drive Letters... .
   b. In the CD-ROM Drive Letters dialog box, change the drive letter to the last available letter, and then click Change.

c. In the confirmation window, confirm that the drive letter should be changed immediately by clicking Yes.

2 For each hard drive partition (excluding the C: partition), change the drive letter to the last available drive letter:

a. Starting with the second partition on drive 0, click the partition to select it.

b. In the Disk Administrator window, select Tools → Drive Letter.

c. In the Assign Drive Letter dialog box, change the drive letter to the last available drive letter, and then click OK.

Result: The Disk Administrator warns you that the drive cannot be locked for exclusive use (so the drive letter cannot be changed immediately).

d. Click OK to continue.

e. In the confirmation dialog box, click Yes to change the drive letter when the system is next restarted.

f. Repeat step 2 for each remaining hard drive partition in the system.

Note: When you change the drive letters on the remaining partitions, you are informed that the drive letters can be changed immediately (click Yes to do so). This is because the partitions are not the primary partition (the one with the operating system installed on it).

3 In the Disk Administrator window, select Partition → Commit Changes Now... to save the drive letter assignment.

Result: A message appears warning you that you should update the emergency repair disk.

4 Click OK to continue.

Result: The system alerts you that the server must now be restarted to allow the drive letters to be changed.

5 Click OK to shut down and restart the server.

6 After the server restarts, log on to the server as the Administrator.

Result: After you log on, a message appears in the System dialog box.

7 Click Cancel to exit.

8 Assign the CD-ROM drive to the correct drive letter:

a. In the Disk Administrator window, select Tools → Assign CD-ROM Drive Letters... .

b. In the CD-ROM Drive Letters dialog box, change the drive letter to the correct letter, and then click Change.

c. In the confirmation window, confirm that the drive letter should be changed immediately by clicking Yes.

9 For each hard drive partition (excluding the C: partition), change the drive letter to the correct drive letter:

a. Start with the extended partition on drive 0, and click the partition to select it.

b. In the Disk Administrator window, select Tools → Drive Letter.

c. In the Assign Drive Letter dialog box, change the drive letter to the correct drive letter, and then click OK.

Result: The Disk Administrator warns you that the drive cannot be locked for exclusive use (so the drive letter cannot be changed immediately).

d. Click OK to continue.

e. In the confirmation dialog box, click Yes to change the drive letter when the system is next restarted.

f. Repeat step 9 for each remaining hard drive partition in the system.

Note: When you change the drive letters on the remaining partitions, you are informed that the drive letters can be changed immediately (click Yes to do so). This is because the partitions are not the primary partition (the one with the operating system installed on it).

10 In the Disk Administrator window, select Partition → Commit Changes Now... to save the drive letter assignment.

Result: A message appears warning you that you should update the emergency repair disk.

11 Click OK to continue.

Result: The system alerts you that the server must now be restarted to allow the drive letters to be changed.

12 Click OK to restart the server.

13 After the server restarts, log on to the server as the Administrator.

14 Ensure the new server has the same logical disk drive letter assignment as the original server.

Installing the Symposium Call Center Server software

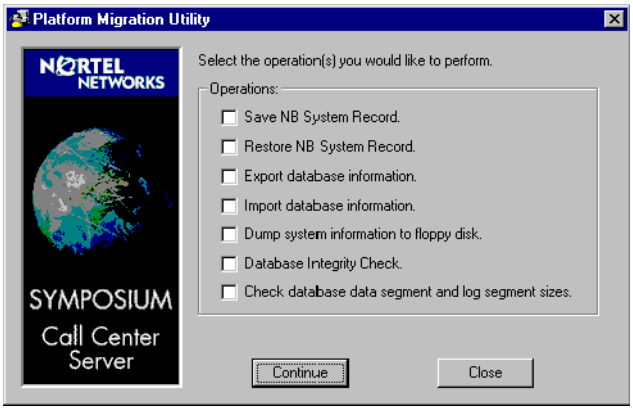
Introduction

You must install the new server with the same Symposium Call Center Server software version and the same PEP level as the original server.

To install the Symposium Call Center Server software

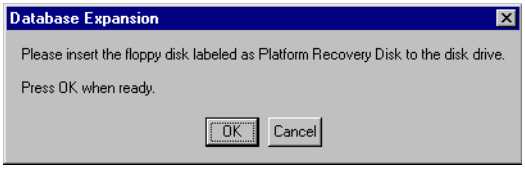
1. Log on to the new server as the administrator.
2. Insert the Platform Recovery Disk from the original server into drive A of the new server.
3. Open a Command window.
4. Type **A:** and press Enter.
5. Type **sysrecres.exe** and press Enter.

   Result: After several minutes, the Platform Migration Utility dialog box appears.



6 Select Import database information from the selection dialog box. Click Continue.

Result: The following dialog box appears:


Database Expansion
Please insert the floppy disk labeled as Platform Recovery Disk to the disk drive.
Press OK when ready.
OK
Cancel

7 Make sure the Platform Recovery Disk is in drive A, and then click OK to continue.

Result: The database information is imported to the new server.

ATTENTION

If you see the message `Please eject the floppy disk from the drives and start the Symposium Call Center Server installation`, click OK and then proceed with steps 9 to 11.

If you see the message `This platform cannot support platform migration. There is not enough disk space`, click OK, proceed with steps 9 and 10, and then follow the procedure "Adjusting the swap file" on page 59. You will be asked to perform steps 1 to 11 in this procedure ("Installing the Symposium Call Center Server software") after you complete the procedure "Adjusting the swap file" on page 59. You might have to perform this procedure for a MAS to MAS migration.

8 Use Windows Explorer or a DOS prompt to make sure that the following files have been copied successfully to the D:\Nortel\ICCM\dbinst directory:

- dbdvc.txt
- dbseg.txt
- olddbsz.txt

9 Remove the disk from drive A and click OK.

Result: The sysrecres.exe utility is terminated.

CAUTION

Risk of database restoration error

Import the original platform database configuration before installing the Symposium Call Center Server software.

10 Close the command prompt window.

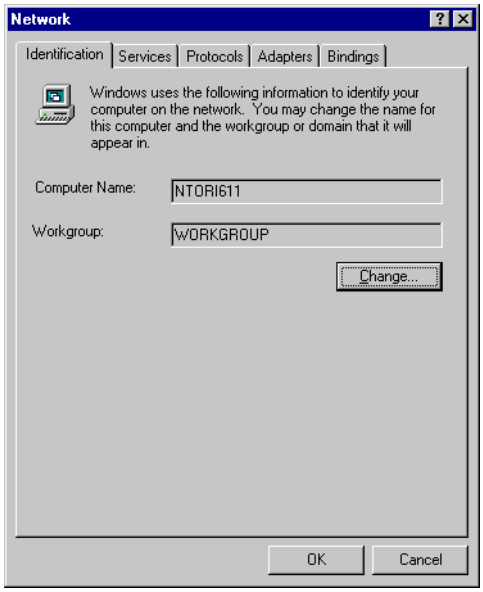
ATTENTION

If you saw the message in step 7 `This platform cannot support platform migration. There is not enough disk space`, follow the procedure "Adjusting the swap file" on page 59 now. You will be asked to perform steps 1 to 11 after you complete the procedure.

11 If the original server is a Release 3.0 server that was converted from a Release 1.x, and if the installed Computer Name of the original server is less than six characters, change the computer name by following these steps; otherwise, skip to step 12.

a. In the Control Panel window, double-click Network.

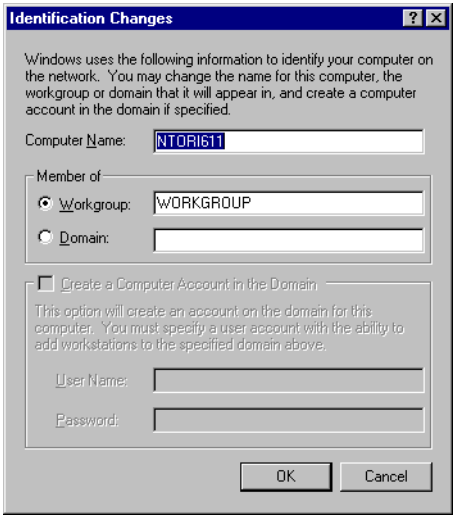
Result: The Network property sheet appears.



b. Record the displayed computer name and provide a copy to the system administrator.

c. Click Change.

Result: The Identification Changes dialog box appears.


Identification Changes
Windows uses the following information to identify your computer on the network. You may change the name for this computer, the workgroup or domain that it will appear in, and create a computer account in the domain if specified.
Computer Name:
NTORI611
Member of
Workgroup:
WORKGROUP
Domain:
Create a Computer Account in the Domain
This option will create an account on the domain for this computer. You must specify a user account with the ability to add workstations to the specified domain above.
User Name:
Password:
OK
Cancel

d. Enter the new computer name (that is, the Current Computer Name of the original server). The computer name must be a single word without spaces, 6–15 characters long. Letters, numbers, a hyphen, and a dash are allowed.

e. Click OK.

Result: A message appears, indicating that the name change was successful.

f. Click OK.

Result: The Network property sheet appears.

g. Click OK.

Result: The system prompts you to restart.

h. Click OK to restart the PC.

Note: If a Dr. Watson error for bcksrvr.exe appears after you restart the PC, click OK to ignore it. This error occurs because the sql.ini file is not up-to-date. This file will be updated during the Symposium Call Center Server installation, and you will not see the error after the installation is completed.

12 Install the DMI. (See “Installing the server software” in the *Software Installation and Maintenance Guide*.)

Note: During the entire installation process, you must use the same setup data you collected from the original server. See the MigInfo.txt file on the Platform Recovery disk for server details.

ATTENTION

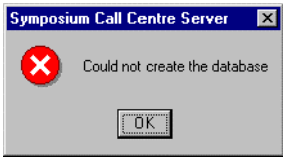
If you see the message `Error: MAS platform setup is not able to execute E:\mas\platform\default\nortel\bin\nbsa_add.exe /a /e`, the password length has been set to greater than 4. See “To change the minimum password length” on page 39.

13 Install the Symposium Call Center Server software. (See “Installing the server software” in the *Software Installation and Maintenance Guide*.)

ATTENTION

During this phase of the installation,

- if you see the message `The database will take between 1 to 3 hours to create...`, then the platform migration is proceeding and should complete successfully. (The database takes up to 5 hours to create.) At this point, to save time, you can perform the database backup on the original server. See “Backing up the original platform database” on page 67.
- if you see the message `This platform cannot support platform migration. There is not enough disk space,` click OK. If the following two error messages appear, click OK to abort the migration procedure. Then, for a MAS to MAS migration, check whether the swap file on drive D is reduced to 32 Mbytes. If it is not reduced to 32 Mbytes, go to the procedure “Adjusting the swap file” on page 59 now. If it is reduced to 32 Mbytes already, contact your Nortel Networks customer support representative.



Notes:

- It is very important that you install the new server with the same Symposium Call Center Server software version as the original server.
- You need not configure the new server in Configuration Mode during installation of the Symposium Call Center Server software.
- If the server is a DMS/MSL server type, the feature key adapter (dongle) need not be connected to the LPT1 parallel port of a new MAS or Platform Vendor Independence server during Symposium Call Center Server installation.

To complete the server installation

1 Return to the server PC and click OK.

Result: The following message appears:

```
In order to recover the Symposium Call Center Server
from catastrophic failure or to migrate to a different
platform using the database tape, the Platform Recovery
disk must be available...
```

2 Click Yes.

Note: If you click No, the following message appears:

```
You have selected not to create the Platform Recovery
disk at this time...
```

You can use the Migration utility to create a Platform Recovery disk when the installation is complete. If you click No, skip to step 5.

Result: The following message appears:

```
Label a floppy disk “Platform Recovery Disk” and insert
it into drive A:.
```

3 Insert a blank formatted disk into drive A and click Yes.

Result: The following message appears:

```
The Platform Recovery disk has been successfully
created...
```

4 Click OK, and then remove the disk and store it in a safe place.

Result: The Reboot dialog box appears.

5 Select Reboot now, and then click Next.

6 After the server restarts, press Ctrl+Alt+Delete to log on.

7 Log on to the new server using the NGenSys account.

8 If you reduced the swap file to 32 Mbytes and the swap file was on drive D on the original server, follow the procedure “To move the swap file from drive D for Windows NT 4.0” on page 64. This moves the swap file to the next available drive, as drive D does not have sufficient free drive space if the swap file is extended to the required 268 Mbytes.

Note: The swap file on a new Platform Vendor Independence platform should be on drive C, and it should be at least the size of RAM plus 11 Mbytes. The swap file on a new MAS platform might be on drive C or D, depending on the size of the drive. For this reason, you must check the location and size of the swap file when migrating from a MAS platform to another MAS platform.

9 If the swap file on the original server was on a drive other than D, and the new server has the same size drive D partition as the original server, follow the procedure “To move the swap file from drive D for Windows NT 4.0” on page 64. This moves the swap file on the new server to the same drive as the original server. To determine the swap file location, see “Checking the swap file location” on page 27. If the new server has a larger size D partition than the original server, do not move the swap file from drive D.

10 Apply the same Performance Enhancement Packages (PEP) level to the new server as in the original server.

Note: It is very important that the new server be installed with the platform migration support PEP and the minimum backup and restore PEP level for the corresponding version. PEPs are available on your regional Symposium Call Center Server PEP web site.

11 With the Symposium Call Center Server software successfully installed, follow these procedures: “Backing up the database of the original server,” “Restoring the original platform database to the new platform,” and “Completing the migration.”

Adjusting the swap file

Introduction

For a MAS to MAS migration, if the physical disk space on drive D cannot accommodate the old database size, an error message appears stating `This platform cannot support platform migration. There is not enough disk space.`

- If this message appears when the database information is being imported to the new server (steps 1 to 7 in "Installing the Symposium Call Center Server software" section), skip the first nine steps and perform steps 10 and 11 as follows.
- If this message appears during installation of the Symposium Call Center Server software (step 13 in "Installing the Symposium Call Center Server software" on page 50), proceed with steps 1 to 11 as follows.

To adjust the swap file

1 Click OK to abort the migration procedure.

2 Check the log file D:\Nortel\iccm\dbinst\sysmig.txt to determine how much more space is required.

3 If the log file indicates that the required disk space is greater than 268 Mbytes, then the new server does not have sufficient disk space on drive D. For assistance, contact your Nortel Networks customer support representative.

4 If the required disk space is less than 268 Mbytes, clean up the Symposium Call Center Server installation by running Uninstall. From the Windows Start menu, choose Programs → Symposium Call Center Server → Uninstall.

5 Click Select All to uninstall all the components for both MAS and Symposium Call Center Server.

6 Follow the on-screen instructions to complete the uninstall process. See the procedure "Uninstalling server software" in the *Software Installation and Maintenance Guide*.

7 When prompted to restart the system, click No.

8 Run uninstall one more time to remove DMI. From the Windows Start menu, choose Programs → Symposium Call Center Server → Uninstall. Follow the on-screen instructions.

9 When prompted to restart the system, click OK.

10 Once the system has restarted, reduce the swap file size on drive D. Set both minimum and maximum values to 32 Mbytes using the procedure "To reduce the swap file size on drive D" on page 61.

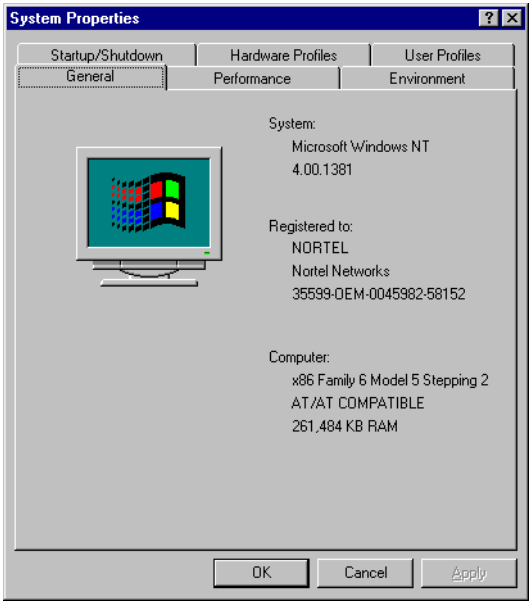
11 Perform all steps in the procedure "Installing the Symposium Call Center Server software" on page 50 to install Symposium Call Center Server software. If you do not see the message `The database will take between 1 to 3 hours to create...`, contact your Nortel Networks customer support representative.

To reduce the swap file size on drive D

Use this procedure only if instructed from the procedure “Adjusting the swap file” on page 59.

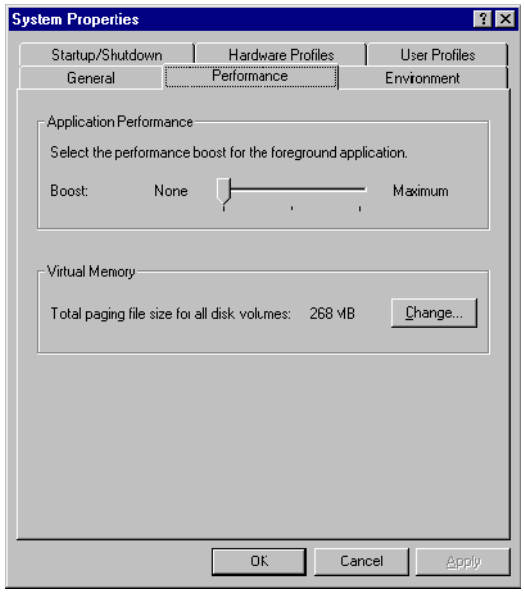
1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties property sheet appears.



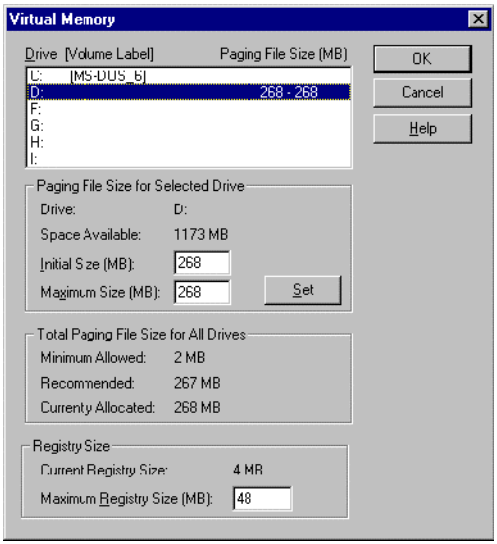
2 Click the Performance tab.

Result: The Performance property page appears.



3 Click Change in the Virtual Memory section.

Result: The Virtual Memory dialog box appears.



4 Highlight drive D.

5 Type **32** for both Initial Size (MB) and Maximum Size (MB).

6 Click Set and accept any warnings presented.

7 On the Virtual Memory dialog box, click OK.

8 On the System Properties property sheet, click Close.

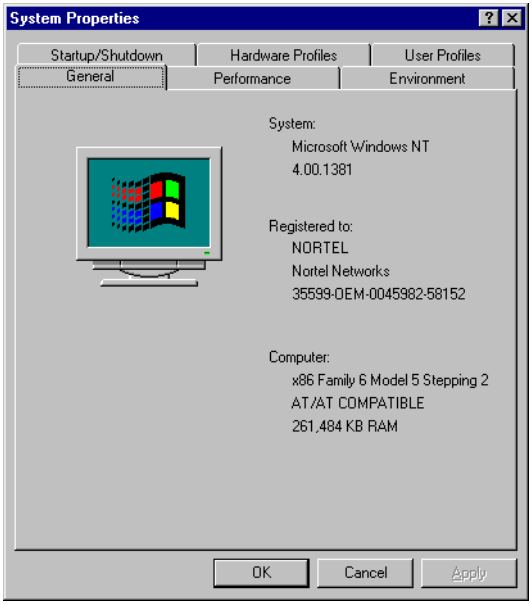
9 Restart the server when prompted.

To move the swap file from drive D for Windows NT 4.0

Use this procedure only if instructed from the procedure “Adjusting the swap file” on page 59 or “Installing the Symposium Call Center Server software” on page 50.

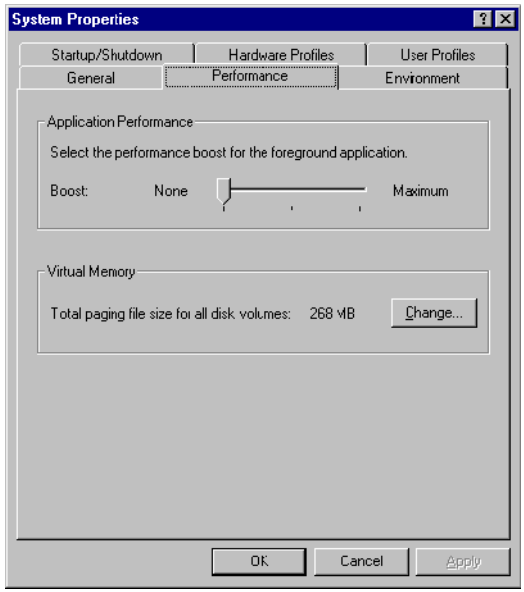
1 From the Windows Start menu, choose Settings → Control Panel, and then double-click the System icon.

Result: The System Properties property sheet appears.



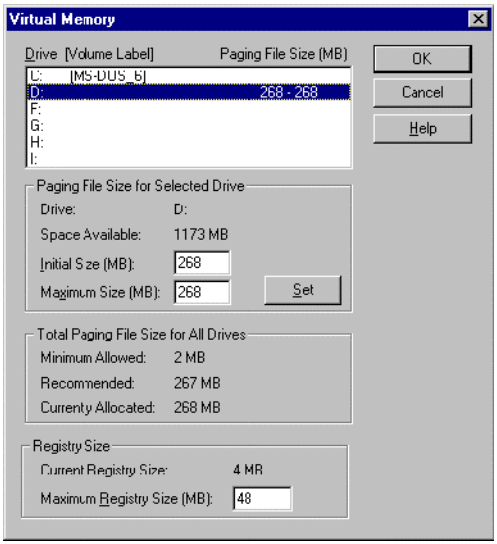
2 Click the Performance tab.

Result: The Performance property page appears.



3 Click Change in the Virtual Memory section.

Result: The Virtual Memory dialog box appears.



4 Highlight drive F or the first drive letter that appears after drive D.

5 Ensure that there are at least 288 Mbytes of available space.

6 If there is not enough available space, select the next available drive and repeat steps 4 and 5. If you check all drives and none have 288 Mbytes of available space, contact your Nortel Networks customer support representative for assistance.

7 Highlight drive D to display the existing swap file Initial Size (MB) and Maximum Size (MB).

8 Type **0** for both Initial Size (MB) and Maximum Size (MB).

9 Click Set and accept any warnings presented.

10 Select the drive identified in steps 4 to 6.

11 Type **268** for both Initial Size (MB) and Maximum Size (MB), and click Set.

12 Click OK to apply the changes.

13 Click Close in the System Properties property sheet.

Result: The system indicates that a restart is required.

14 Click Yes to restart the system now.

Backing up the original platform database

The migration process involves backing up the entire database of the original server. You can perform this process as you configure the new server and install the Symposium Call Center Server software, or you can perform the process ahead of time.

Note: The migration process allows the original server to remain online and in active service while the database is backed up and restored to the new server. This causes some call statistics and data pegging to be missing from the backup tape.

ATTENTION

If it is important that all call statistic and data pegging be migrated to the new server, take the original server offline before the database backup. Ensure that the original server remains offline until all data has been successfully migrated to the new server. You must collect all call statistics and data pegging before the original server is removed from service.

Note: Although the database backup is an online process, it adds an additional load to the server and reduces overall call center performance. Nortel Networks recommends that you perform this procedure during non-peak traffic hours. Do not change any call center configuration or user setup information during the database backup operation.

CAUTION

Risk of tape read error

If a backup tape is not wound evenly on its spool, the tape drive might initiate a Foreign Tape error when attempting to read an unevenly tensioned tape area during the restoral process. To prevent this from happening, ensure that the backup tape is evenly tensioned by fast-forwarding to the end of the tape and then rewinding to the beginning of the tape as shown in the following procedure.

To tension a backup tape

Perform this procedure before attempting to restore a server from a backup tape.

1. Insert the backup tape into the tape drive.
2. From the Windows Start menu, choose Programs → Administrative Tools → Backup.
3. From the Operations menu, choose Retension Tape.

   Result: The tape fast-forwards to the end, and then it rewinds.
4. When the tape has finished rewinding, exit the Administrative Tools and start the restoral procedure.

Backing up the database of the original server

To back up the database of the original server

1. Insert a blank tape into the original platform tape drive.
2. From a client PC, log on to the original platform as a Symposium Call Center Server administrator.
3. Schedule a partial database backup (database only) on the original platform. Refer to the *Software Installation and Maintenance Guide*.
4. Once the database backup is complete on the original platform, remove the backup tape. Save this backup tape for the restore of the original platform database on the new server.

Restoring the original platform database to the new platform

Introduction

The final part of the migration procedure involves restoring the original server database backup to the newly installed server. The new server must have been installed with the same Symposium Call Center Server software version as the original server. The new server does not need to be connected to the network or the M1 or DMS switch.

To restore the original platform database to the new platform

1 Shut down the Symposium Call Center Server services by following these steps:

Note: Do not attempt to shut down services while the services are being started up.

a. Open a Command window (from the Start menu, choose Programs → Command Prompt).

b. In the Command window, type **D:** and press Enter.

c. Type **cd \nortel\iccm\bin** and press Enter.

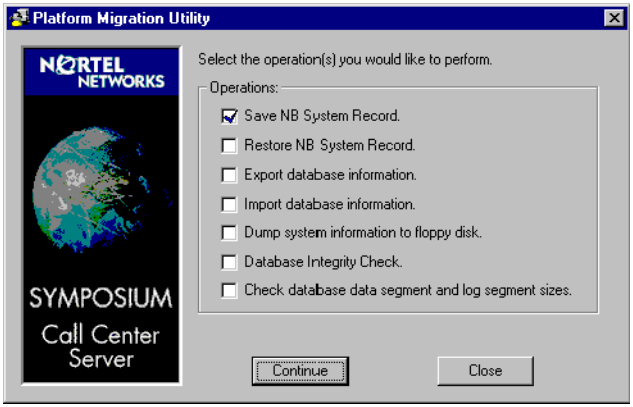
d. Type **iccmsd –a –h1** and press Enter.

Result: The Symposium Call Center Server services shut down.

e. Verify that all services are shut down. On the service status summary dialog box, click Accept.

2 From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

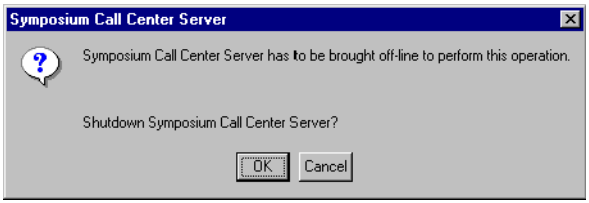
Result: The Platform Migration Utility dialog box appears.



3 Save the NB System Record by following these steps:

a. Choose the Save NB System Record option. Click Continue.

Result: The following dialog box appears:


Symposium Call Center Server
Symposium Call Center Server has to be brought off-line to perform this operation.
Shutdown Symposium Call Center Server?
OK
Cancel

b. Click OK to shut down the Symposium Call Center Server.

Result: When the Symposium Call Center Server shuts down, the following dialog box appears:

Save NBSystemRecord
Please insert a blank pre-formatted floppy disk to the disk drive for NBSystemRecord.
Press OK when ready.
OK
Cancel

c. Insert a blank preformatted disk into the floppy disk drive, and click OK to continue after the disk is inserted.

Result: The following dialog box appears:

Symposium Call Center Server
System Record was saved successfully.
Please eject the floppy disk and label it as NBSystemRecord Backup.
OK

d. Eject the disk and label it as instructed. Click OK to terminate the utility (the utility closes automatically after you click OK). Set aside the SystemRecord backup disk for step 10.

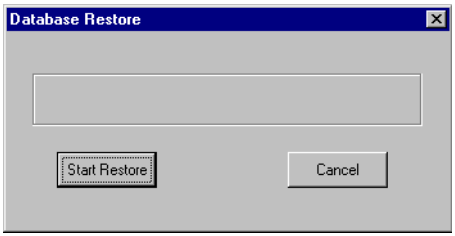
4 Insert the database backup tape from the original platform into the tape drive of the new platform.

ATTENTION

The new platform must have a tape drive and driver software compatible with the original platform. The new platform must be installed with the minimal backup and restore PEP level before you can proceed to the next step. The computer name of the new server must be the same as that of the original server.

5 On the new server, from the Windows Start menu, choose Programs → Symposium Call Center Server → Database Restore to migrate the original platform database to the new platform.

Result: The Database Restore dialog box appears.

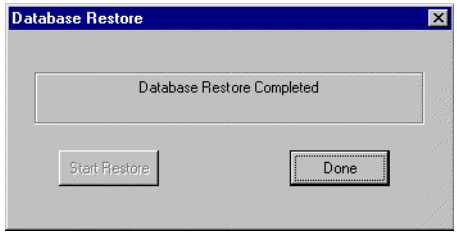


6 Click Start Restore to begin the database restore process.

Result: The message `Please ensure the database backup tape is in the tape drive` appears.

7 Click OK to continue.

Result: The database takes one to three hours to restore, depending on the amount of data. The following dialog box appears:



Note: A log file is created with the following pathname after the database restore is completed:
D:\Nortel\data\backup\RestoreLogs\restore.log

8 Click Done.

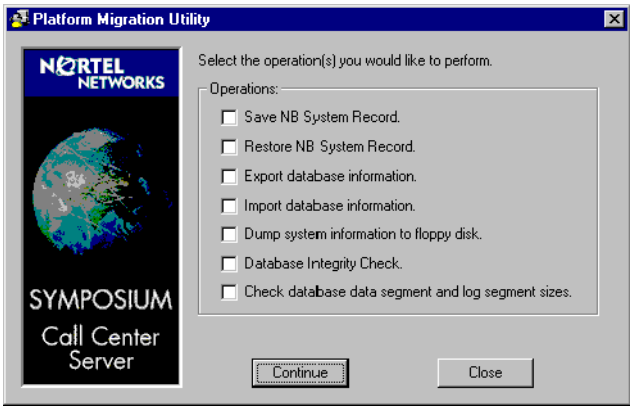
Result: The following dialog box appears:

9 Eject the backup tape from the tape drive, and then click OK to exit the Database Restore utility. *Do not* restart the server.

10 Restore the SystemRecord by following these steps:

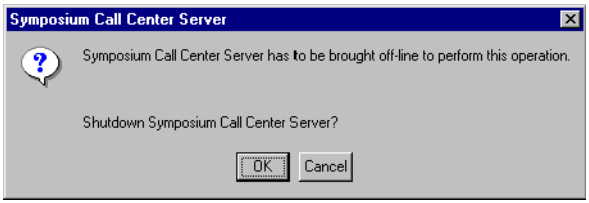
a. From the Windows Start menu, choose Programs → Symposium Call Center Server → Migration.

Result: The Platform Migration Utility dialog box appears.



b. Select the Restore NB System Record option. Click Continue.

Result: The following dialog box appears:


Symposium Call Center Server
Symposium Call Center Server has to be brought off-line to perform this operation.
Shutdown Symposium Call Center Server?
OK
Cancel

c. Click OK to shut down the Symposium Call Center Server.

Result: When the Symposium Call Center Server shuts down, the following dialog box appears:

Restore NBSystemRecord
Please insert the floppy disk labeled as NBSystemRecord Backup to the disk drive.
Press OK when ready.
OK
Cancel

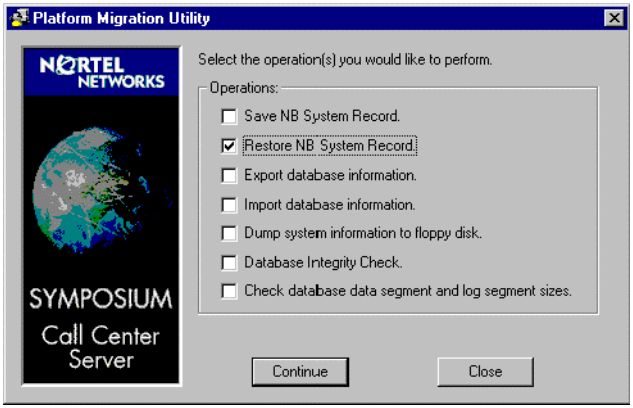
d. Insert the SystemRecord Backup disk created in step 3 into the drive, and click OK to continue.

Note: It takes some time for the database server to recover from the database restore and can take several minutes for the SQL database server to start up properly. The utility waits until the SQL server is started before restoring the SystemRecord table. Wait until the following dialog box appears:

Symposium Call Center Server
NBSystem Record has been restored successfully.
Please eject the floppy disk from the disk drive.
OK

e. Eject the SystemRecord Backup disk from the drive, and then click OK to continue.

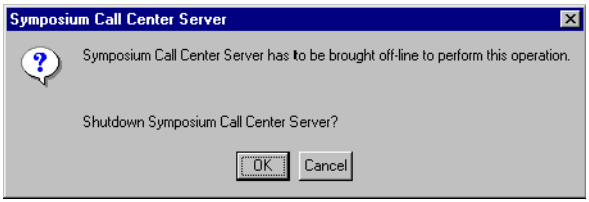
Result: The selection dialog box appears.



11 Perform the database integrity check by following these steps:

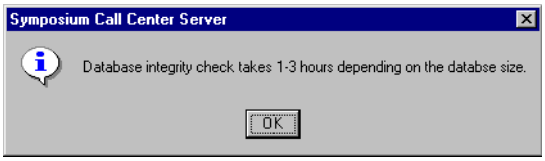
a. Select the Database Integrity Check option. Click Continue.

Result: The following dialog box appears:


Symposium Call Center Server
Symposium Call Center Server has to be brought off-line to perform this operation.
Shutdown Symposium Call Center Server?
OK
Cancel

b. Click OK.

Result: The following dialog box appears:



c. Click OK to start the database integrity check.

Note: The database integrity check takes a while to complete, and you might not see any activity on the screen, but you should notice continuous disk activity. Wait until the following dialog box appears:

Symposium Call Center Server
Database integrity check completed successfully.
Please see C:\DbChk.log for integrity check result.
OK

d. Click OK to terminate the utility (the utility closes automatically when you click OK).

e. Check the database check log (C:\DbChk.log) for database errors.

Note: Contact your Nortel Networks customer support representative for any detected database error. *Do not* put the server into service with any detected database errors, even though it might seem to be functioning normally. When checking the log file, search for key words such as ERROR or MSG.

Completing the migration

To complete the migration

1. If the tape drive on the new server is not the original tape drive, remove it and replace it with the original drive, including the proper driver software.
2. Shut down the call center operation and services on the original server. Disconnect the original server from the network.
3. If the server is a DMS/MSL server type, disconnect the Nortel Networks software feature key adapter (dongle) from the LPT1 parallel port of the original platform and move it to the new platform for a MAS or Platform Vendor Independence platform only.
4. Connect the new server to the network. Restart the server to full service.
5. Verify the proper operation of the Symposium Call Center Server software on the new server.
6. Back up the new server's database. (See the *Software Installation and Maintenance Guide*.)
7. Create a platform recovery disk for the new server. Without this disk, the server cannot be restored if there is a system failure. (See "To collect information from the Migration Utility" on page 18.)

   Note: Nortel Networks recommends that you perform a database backup on the new server before putting the server into full service.

Glossary

A

accelerator key

A key on a phoneset that an agent can use to place a call quickly. When an agent presses an accelerator key, the system places the call to the configured number associated with the key. For example, if an agent presses the Emergency key, the system places a call to the agent's supervisor.

access class

A collection of access levels that defines the actions a member of the access class can perform within the system. For example, a member of the Administrator access class might be given a collection of Read/Write access levels.

access level

A level of access or permission given to a particular user for a particular application or function. For example, a user might be given View Only access to historical reports.

ACCESS link

A communication channel between the Symposium Call Center Server and Meridian Mail.

ACCESS voice port

A Meridian Mail voice port that is controlled by the ACCESS link.

ACD call

See Automatic call distribution call.

ACD-DN

See Automatic call distribution directory number.

ACD group

See Automatic call distribution group.

ACD routing table
See Automatic call distribution routing table.

ACD subgroup
See Automatic call distribution subgroup.

acquired resource
A resource configured on the switch that is under the control of the Symposium Call Center Server. Resources must be configured with matching values on both the switch and the Symposium Call Center Server.

activated script
A script that is processing calls or is ready to process calls. Before you can activate a script, you must first validate it.

activity code
A number that an agent enters on his or her phoneset during a call. Activity codes provide a way of tracking the time agents spend on various types of incoming calls. They are also known as Line of Business (LOB) codes. For example, the activity code 720 might be used to track sales calls. Agents can then enter 720 on their phonesets during sales calls, and this information can be generated in an Activity Code report.

administrator
A user who is responsible for maintaining the Symposium Call Center Server.

agent
A user who is responsible for handling customer calls.

agent login ID
A unique identification number assigned to a particular agent. The agent uses this number when logging on. The agent ID is not associated with any particular phoneset.

agent to skillset assignment
A matrix that, when you run it, sets the priority of one or more agents for a skillset. Agent to skillset assignments can be scheduled.

agent to supervisor assignment

A definition that, when you run it, assigns one or more agents to specific supervisors. Agent to supervisor assignments can be scheduled.

application

1. A logical entity that represents a Symposium Call Center Server script for reporting purposes. The master script and each primary script have an associated application. The application has the same name as the script it represents. 2. A program that runs on a computer.

application program interface

A set of routines, protocols, and tools that programmers use to develop software applications. APIs simplify the development process by providing commonly used programming procedures.

associated supervisor

A supervisor who is available for an agent if the agent's reporting supervisor is unavailable. *See also* reporting supervisor.

Automatic call distribution call

A call to an ACD-DN. ACD calls are distributed to agents in an ACD group based on the ACD routing table on the switch.

Automatic call distribution directory number

Primary and supplementary DNs associated with an ACD group. Calls made to these DNs are distributed to agents belonging to the group, based on the ACD routing table on the switch.

Automatic call distribution group

An entity defined on the switch for the purpose of call distribution. When a customer dials an ACD group, the call is routed to any agent who is a member of that group.

Automatic call distribution routing table

A table configured on the switch that contains a list of ACD-DNs used to define routes for incoming calls. This ensures that incoming calls not processed by Symposium Call Center Server will be queued to ACD groups and handled by available agents.

Automatic call distribution subgroup

An entity defined on the switch to assign supervisory responsibilities. Each subgroup has one supervisor phoneset and a number of agent phonesets associated with it. Agents can log on to any phoneset within their ACD subgroup. The supervisor must log on to the supervisor phoneset to monitor his or her assigned agents.

C

call age

The amount of time a call was waiting in the system before being answered by an agent.

call destination

The site to which an outgoing network call is sent. *See also* call source.

call intrinsic

A script element that stores call-related information assigned when a call enters the Symposium Call Center Server. *See also* intrinsic, skillset intrinsic, time intrinsic, traffic intrinsic.

call presentation class

A collection of preferences that determines how calls are presented to an agent. A call presentation class specifies whether a break time between calls is allowed, whether calls can be presented to an agent whose secondary DN is active, whether an agent can put DN calls on hold for incoming ACD calls, and whether an agent phoneset displays that the agent is reserved for a network call.

call priority

A numerical value assigned in a script that defines the relative importance of a call. If two calls are in the queue when an agent becomes available, and one call is queued with a higher priority than the other, the agent receives the higher priority call first. *See also* skillset priority.

call source

The site from which an incoming network call originates. *See also* call destination.

call treatment

A script element that enables you to provide handling to a call while it is waiting to be answered by a call center agent. For example, a caller can hear a recorded announcement or music while waiting for an agent.

call variable

A script variable that applies to a specific call. A call variable follows the call through the system and is passed from one script to another with the call. *See also* global variable, script variable.

Calling Line Identification

This is an optional service that identifies the telephone number of the caller. This information can then be used to route the call to the appropriate agent or skillset. The CLID can also be displayed on an agent's phoneset.

CDN

See controlled directory number.

CLAN

See Customer local area network.

CLID

See Calling Line Identification.

client

The part of Symposium Call Center Server that runs on a personal computer or workstation and relies on the server to perform some operations. *See also* server.

command

A building block used with expressions, variables, and intrinsics to create scripts. Commands perform distinct functions, such as routing a call to a specific destination, playing music to a caller, or disconnecting a caller.

controlled directory number

A special directory number that allows calls arriving at the switch to be queued when the CDN is controlled by an application such as Symposium Call Center Server. When a call arrives at this number, the switch notifies the application and waits for routing instructions, which are performed by scripts in Symposium Call Center Server.

Customer local area network

The LAN to which your corporate services and resources connect. The Symposium Call Center Server and client both connect to the CLAN. Third-party applications that interface with the server also connect to this LAN.

D

DBMS

Database Management System

deactivated script

A script that does not process any new calls. If a script is in use when it is deactivated, calls continue to be processed by the script until they are completed.

default activity code

The activity code that is assigned to a call if an agent does not enter an activity code manually, or when an agent presses the activity code button twice on his or her phoneset.

Each skillset has a defined default activity code.

default skillset

The skillset to which calls are queued if they have not been queued to a skillset or a specific agent by the end of a script.

desktop user

A configured user who can log on to the Symposium Call Center Server from a client PC.

destination site

The site to which an outgoing network call is sent. *See also* source site.

DHCP
See dynamic host configuration protocol.

Dial-Up Networking
See Remote Access Services.

Dialed Number Identification Service
An optional service that allows Symposium Call Center Server to identify the phone number dialed by the incoming caller. An agent can receive calls from customers calling in on different DNISs and, if the DNIS is displayed on the phoneset, can prepare a response according to the DNIS.

directory number
The number that identifies a phoneset on a switch. The directory number (DN) can be a local extension (local DN), a public network telephone number, or an automatic call distribution directory number (ACD-DN).

directory number call
A call that is presented to the DN key on an agent's phoneset.

display threshold
A threshold used in real-time displays to highlight a value below or above the normal range.

DMS
Digital Multiplex Switch.

DN
See directory number.

DN call
See directory number call.

DNIS
See Dialed Number Identification Service.

dongle
The attachment plugged into the parallel port of a server that authenticates the serial number required at the time of server installation.

dynamic host configuration protocol
A protocol for dynamically assigning IP addresses to devices on a network.

dynamic link library
A library of executable functions or data that can be used by a Windows application. Typically, a DLL provides one or more particular functions and a program accesses the functions by creating either a static or dynamic link to the DLL. A DLL can be used by several applications at the same time.

E

ELAN
See embedded local area network.

embedded local area network
A dedicated Ethernet TCP/IP LAN that connects the Symposium Call Center Server and the switch.

Emergency key
A key on an agent's phoneset that, when pressed by an agent, automatically calls his or her supervisor to notify the supervisor of a problem with a caller.

event
1. An occurrence or action on the Symposium Call Center Server, such as the sending or receiving of a message, the opening or closing of an application, or the reporting of an error. Some events are for information only, while others can indicate a problem. Events are categorized by severity: information, minor, major, and critical. 2. An action generated by a script command, such as queuing a call to a skillset or playing music.

expression
A building block used in scripts to test for conditions, perform calculations, or compare values within scripts. *See also* logical expression, mathematical expression, Redundant Array of Inexpensive Disks.

F

filter timer

The length of time after the system unsuccessfully attempts to route calls to a destination site, before that site is filtered out of a routing table.

first-level threshold

The value that represents the lowest value of the normal range for a statistic in a threshold class. The system tracks how often the value for the statistic falls below this value.

G

global settings

Settings that apply to all skillsets or IVR ACD-DNs that are configured on your system.

global variable

A variable that contains values that can be used by any script on the system. The value of a global variable can only be changed in the Script Variable Properties sheet. It cannot be changed in a script. *See also* call variable, script variable.

I

ICM

See Intelligent Call Manager.

Incalls key

The key on an agent phoneset to which incoming ACD and Symposium Call Center Server calls are presented.

Intelligent Call Manager

A high capacity call center TCP/IP interface to the switch that enables the exchange of messages between the switch and a remote host computer.

Interactive voice response

An application that allows telephone callers to interact with a host computer using prerecorded messages and prompts.

Interactive voice response ACD-DN

A directory number that routes a caller to a specific IVR application. An IVR ACD-DN must be acquired for non-integrated IVR systems.

Interactive voice response event
A voice port login or logout. An IVR event is pegged in the database when a call acquires or de-acquires a voice port.

Internet Protocol address
An identifier for a computer or device on a TCP/IP network. Networks use the TCP/IP protocol to route messages based on the IP address of the destination. For customers using NSBR, site IP addresses must be unique and correct. The format of an IP address is a 32-bit numeric address written as four numbers separated by periods. Each number can be 0 to 255. For example, 1.160.10.240 could be an IP address.

intrinsic
A word or phrase used in a script to gain access to system information about skillsets, agents, time, and call traffic that can then be used in formulas and decision-making statements. *See also* call intrinsic, skillset intrinsic, time intrinsic, traffic intrinsic.

IP address
See Internet Protocol address.

IVR
See Interactive voice response.

IVR ACD-DN
See Interactive voice response ACD-DN.

IVR event
See Interactive voice response event.

IVR port
See voice port.

L

LAN
See Local area network.

Line of Business code
See activity code.

LOB code
See activity code.

Local area network
A computer network that spans a relatively small area. Most LANs connect workstations and personal computers and are confined to a single building or group of buildings.

local call
A call that originates at the local site. *See also* network call.

local skillset
A skillset that can be used at the local site only. *See also* network skillset, skillset.

logical expression
A symbol used in scripts to test for different conditions. Logical expressions are AND, OR, and NOT. *See also* mathematical expression, Redundant Array of Inexpensive Disks.

M

M1
Meridian 1 switch

master script
The first script executed when a call arrives at the Symposium Call Center Server. A default master script is provided with Symposium Call Center Server, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* network script, primary script, script, secondary script.

mathematical expression
An expression used in scripts to add, subtract, multiply, and divide values. Mathematical expressions are addition (+), subtraction (-), division (/), and multiplication (*). *See also* logical expression, Redundant Array of Inexpensive Disks.

Meridian Link Services
A communications facility that provides an interface between the switch and a third-party host application.

Meridian Mail
A Nortel Networks product that provides voice messaging and other voice and fax services.

Meridian MAX
A Nortel Networks product that provides call processing based on ACD routing.

MLS
See Meridian Link Services.

MM
See Meridian Mail.

MSL-100
Meridian Series 100 switch

music route
A resource installed on the switch that provides music to callers while they wait for an agent.

N

NACD call
A call that arrives at the server from a network ACD-DN.

NCC
See Network Control Center.

network call
A call that originates at another site in the network. *See also* local call.

Network Control Center
The server on a Symposium Call Center Server system where NSBR is configured and where communication between servers is managed.

network script
The script that is executed to handle error conditions for Symposium Call Center Server calls forwarded from one site to another, for customers using NSBR. The network script is a system-defined script provided with Symposium Call Center Server, but it can be customized by an authorized user. It can be deactivated but not deleted. *See also* master script, primary script, script, secondary script.

Network Skill-Based Routing
An optional feature with Symposium Call Center Server that provides skill-based routing to multiple networked sites.

network skillset
A skillset that is common to every site on the network. Network skillsets must be created at the Network Control Center (NCC).

night mode
A skillset state in which the server does not queue incoming calls to the skillset, and in which all queued calls are given night treatment. A skillset goes into night mode automatically when the last agent logs off, or the administrator can put it into night mode manually. *See also* out-of-service mode, transition mode.

NPA
See Number Plan Area.

NSBR
See Network Skill-Based Routing.

Number Plan Area
Area code

O

object linking and embedding
A compound document standard that enables you to create objects with one application and then link or embed them in a second application.

ODBC
See Open Database Connectivity.

OEM
Original equipment manufacturer

OLE
See object linking and embedding.

Open Database Connectivity
A Microsoft-defined database application program interface (API) standard.

out-of-service mode
A skillset state in which the skillset does not take calls. A skillset is out of service if there are no agents logged on or if the supervisor puts the skillset into out-of-service mode manually. *See also* night mode, transition mode.

out-of-service skillset
A skillset that is not taking any new calls. While a skillset is out of service, incoming calls cannot be queued to the skillset. *See also* local skillset, network skillset, skillset.

P

PBX
See private branch exchange.

pegging
The action of incrementing statistical counters to track and report on system events.

pegging threshold
A threshold used to define a cut-off value for statistics such as short call and service level. Pegging thresholds are used in reports.

PEP
See Performance Enhancement Package.

Performance Enhancement Package

A Symposium Call Center Server supplementary software application that enhances the functionality of previously released software by improving performance, adding functionality, or correcting a problem discovered since the original release.

personal directory number

A DN on which an agent can be reached directly, usually for private calls.

phoneset

The physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

phoneset display

The display area on an agent's phoneset where information about incoming calls can be communicated.

Position ID

1. A unique identifier for a phoneset, used by the switch to route calls to the phoneset. 2. Referred to as Telephony/Port Address in Symposium Call Center Server.

primary ACD-DN

A directory number that callers can dial to reach an ACD group.

primary script

A script that is executed or referenced by the master script. A primary script can route calls to skillsets, or it can transfer routing control to a secondary script. *See also* master script, network script, script, secondary script.

private branch exchange

A telephone switch, typically used by a business to service its internal telephone needs. A PBX usually offers more advanced features than are generally available on the public network.

R

RAID

See Redundant Array of Inexpensive Disks.

RAN
recorded announcement

RAN route
See recorded announcement route.

RAS
See Remote Access Services.

recorded announcement route
A resource installed on the switch that offers a recorded announcement to callers.

Redundant Array of Inexpensive Disks
A category of disk drives that employs two or more drives in combination for fault tolerance and performance.

relational expression
An expression used in scripts to test for different conditions. Relational expressions are less than (<), greater than (>), less than or equal to (< =), greater than or equal to (> =), and not equal to (< >). *See also* logical expression, mathematical expression.

Remote Access Services
A feature built into Windows NT and Windows 95 that enables users to log on to an NT-based LAN using a modem, X.25 connection, or WAN link. This feature is also known as Dial-Up Networking.

reporting supervisor
The supervisor who has primary responsibility for an agent. When an agent presses the Emergency key on the phoneset, the emergency call is presented to the agent's reporting supervisor. *See also* associated supervisor.

round robin routing table
A routing table that queues the first call to the first three sites in the routing table, then the second three sites, then the third three sites, and so on, until an agent is reserved at one of the sites. *See also* sequential routing table.

route
A group of trunks. Each trunk carries either incoming or outgoing calls to the switch. *See also* music route, RAN route.

router
A device that connects two LANs. Routers can also filter messages and forward them to different places based on various criteria.

routing table
A table that defines how calls are routed to the sites on the network. *See also* round robin routing table, sequential routing table.

S

sample script
A script that is installed with the Symposium Call Center Server client. Sample scripts are stored as text files in a special folder on the client. The contents of these scripts can be imported or copied into user scripts to create scripts for typical call center scenarios.

SCM
See Service Control Manager.

script
A set of instructions that relates to a particular type of call, caller, or set of conditions, such as time of day or day of week. *See also* master script, network script, primary script, secondary script.

script variable
See variable.

second-level threshold
The value used in display thresholds that represents the highest value of the normal range for a given statistic.

secondary directory number
A DN defined on the agent's phoneset as a Centrex line for incoming and outgoing non-ACD calls.

secondary script

Any script (other than a master, network, or primary script) that is referenced from a primary script or any other secondary script. There is no pegging of statistics for actions occurring during a secondary script. *See also* master script, network script, primary script, script.

sequential routing table

A routing table method that always queues a call to the first three active sites in the routing table. *See also* round robin routing table.

server

A computer or device on a network that manages network resources. Examples of servers include file servers, print servers, network servers, and database servers. The Symposium Call Center Server is used to configure the operations of the call center. *See also* client.

service

A process that adheres to a Windows NT structure and requirements. A service provides system functionality.

Service Control Manager

A Windows NT process that manages the different services on the PC.

service level

The percentage of incoming calls answered within a configured number of seconds.

service level threshold

A parameter that defines the number of seconds within which incoming calls should be answered.

Simple Network Management Protocol

A set of protocols for managing complex networks. SNMP works by sending messages, called protocol data units (PDUs), to different parts of a network and then analyzing the responses.

site

1. A system using Symposium Call Center Server that can be accessed using SMI.

2. A system using Symposium Call Center Server and participating in Network Skill-Based Routing.

skillset

A group of capabilities or knowledge required to answer a specific type of call.

See also local skillset, network skillset.

skillset intrinsic

A script element that inserts information about a skillset in a script. Skillset intrinsics return values such as skillsets, integers, and agent IDs. These values are then used in queuing commands. *See also* call intrinsic, intrinsic, time intrinsic, traffic intrinsic.

skillset priority

An attribute of a skillset assignment that determines the order in which calls from different skillsets are presented to an agent. When an agent becomes available, calls might be waiting for several of the skillsets to which the agent belongs. The server presents the call queued for the skillset for which the agent has the highest priority.

SNMP

See Simple Network Management Protocol.

source site

The site from which an incoming network call originates. *See also* destination site.

standby

In skillset assignments, a property that grants an agent membership in a skillset, but makes the agent inactive for that skillset.

supervisor

A user who manages a group of agents. *See also* associated supervisor and reporting supervisor.

supplementary ACD-DN
A DN associated with a primary DN. Any calls to the supplementary DN are automatically routed to the primary DN. A supplementary DN can be a toll-free (1-800) number, for example.

switch
The hardware that receives incoming calls and routes them to their destination.

switch resource
A device that is configured on the switch. For example, a CDN is configured on the switch, and then is used as a resource with Symposium Call Center Server. *See also* acquired resource.

Symposium Call Center Server call
A call to a CDN that is controlled by the Symposium Call Center Server. The call is presented to the Incalls key on an agent's phoneset.

system-defined scripts
The Master_Script and the Network_Script (if NSBR is enabled). These scripts This script can be customized or deactivated by a user, but cannot be deleted. These scripts are This script is the first scripts executed for every local or network call arriving at the call center.

T

target site
See destination site.

TCP/IP
See Transmission Control Protocol/Internet Protocol.

telephony
The science of translating sound into electrical signals, transmitting them, and then converting them back to sound. The term is used frequently to refer to computer hardware and software that perform functions traditionally performed by telephone equipment.

threshold
A value for a statistic at which system handling of the statistic changes.

threshold class

A set of options that specifies how statistics are treated in reports and real-time displays. *See also* display threshold, pegging threshold.

time intrinsic

A script element that stores information about system time, including time of day, day of week, and week of year. *See also* call intrinsic, intrinsic, skillset intrinsic, traffic intrinsic.

Token Ring

A PC network protocol developed by IBM. A Token Ring network is a type of computer network in which all the computers are arranged schematically in a circle.

traffic intrinsic

An intrinsic that inserts information about system-level traffic in a script. *See also* call intrinsic, intrinsic, skillset intrinsic, time intrinsic.

transition mode

A skillset state in which the server presents already queued calls to a skillset. New calls queued to the skillset are given out-of-service treatment. *See also* night mode, out-of-service mode.

Transmission Control Protocol/Internet Protocol

The communication protocol used to connect devices on the Internet. TCP/IP is the standard protocol for transmitting data over networks.

treatment

See also call treatment.

trunk

A communications link between a PBX and the public central office, or between PBXs. Various trunk types provide services such as Direct Inward Dialing (DID trunks), ISDN, and Central Office connectivity.

U

user-created script

A script that is created by an authorized user on the Symposium Call Center Server system. Primary and secondary scripts are user-created scripts.

user-defined script

A script that is modified by an authorized user on the Symposium Call Center Server system.

utility

A program that performs a specific task, usually related to managing system resources. Operating systems contain a number of utilities for managing disk drives, printers, and other devices.

V

validation

The process of checking a script to ensure that all the syntax and semantics are correct. A script must be validated before it can be activated.

variable

A placeholder for values calculated within a script, such as CLID. Variables are defined in the Script Variable Properties sheet and can be used in multiple scripts to determine treatment and routing of calls entering the Symposium Call Center Server.

voice port

A connection from a telephony port on the switch to a port on the IVR system.

W

WAN

See also Wide area network.

Wide area network

A computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local area networks (LANs). The largest WAN in existence is the Internet.

workload scenarios

Sets of configuration values defined for typical patterns of system operations. Five typical workload scenarios (entry, small, medium, large, and upper end) are used in the Capacity Assessment Tool for capacity analysis for the Symposium Call Center Server.

Index

A

assumptions 8

B

backing up the database 67
backup tape, tensioning 68

C

changing
  drive letters on the new server 46
  minimum password length 39
  swap file size 59
checking
  computer name 25
  disk partition information 21
  partitioning on the original server 24
  PEP level 32
  RAM size 26
  server software version 30
  swap file location 27
  Windows NT version on original server 25
checking for installation addendum 12
checklist, migration 12
collecting
  information from the migration utility 18
  original server information 17
completing
  migration 77
  server installation 56
computer name worksheet 35
computer name, checking 25
configuring the new server 44
conversion and migration 10

D

database
  backing up 67
  restoring 70
database backup tape drive 16
disk partition configuration worksheet 34
disk partition information, checking 21
drive letters, changing on the new server 46

H

hard drives, partitioning 4Gbyte and 9Gbyte 23

I

information, platform recovery disk 19
installation addendum, checking for 12
installing Symposium Call Center Server software 50

L

larger size platform, migration to 10
location, swap file 10, 43

M

MAS platform to PVI platform, migration 11
materials, required 15
migrating to another platform 5–77
migration
  and conversion 10
  checklist 12
  completing 77
  from MAS platform to PVI platform 11
  not supported 11

preparing for 15
to a larger size platform 10
to the same size platform 11
migration utility, collecting information from 18
minimum password length, changing 39
moving the swap file 64

N

NCC server types 8
new server
changing the drive letters 46
configuring 44
preparing 39

O

original server information, collecting 17

P

partitioning
4Gbyte and 9Gbyte hard drives 23
checking on the original server 24
partitions, checking 21
password length 39
PEP level worksheet 36
PEPs, checking for installed 32
platform recovery disk information 19
platform vendor independence, migration to 11
platform, migrating to another 5–77
preparing
for migration 15
the new server 39
PVI platform, migration to 11

R

RAM size worksheet 35
RAM size, checking 26
reducing the swap file size on drive D 61
required materials 15
requirements, server 6
restoring the database 70

S

same size platform, migration to 11
server
requirements 6
software, installing 50
types, NCC 8
server installation
completing 56
server software version
checking 30
servers, supported 6
software, Symposium Call Center Server 15
supported servers 6
swap file
changing size of 59
checking location of 27
location 10, 43
moving 64
reducing the size 61
swap file location worksheet 35
Symposium Call Center Server
components 3
description 3
Symposium Call Center Server software 15
Symposium Call Center Server software, installing 50
Symposium Call Center Server version worksheet 36

T

tape drive 16
tensioning a backup tape 68

W

Windows NT version worksheet 35
Windows NT version, checking on original server 25
worksheet
computer name 35

disk partition configuration 34
PEP level 36
RAM size 35
swap file location 35
Symposium Call Center Server version 36
Windows NT version 35

NORTEL NETWORKS™

Reader Response Form

Symposium Call Center Server
Product release 4.0
Platform Migration Guide

Tell us about yourself:

Name: _____

Company: _____

Address: _____

_____

Occupation: _____ **Phone:** _____

1. What is your level of experience with this product?

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   _____

   _____

   _____

5. What information (if any) was missing from this book?

   _____

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   _____

6. How could we improve this book?

   _____

   _____

   _____

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Reader Response Form

Reader Response Form

Symposium Call Center Server

Platform Migration Guide

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Product release:	4.0
Document release:	Standard 1.0
Date:	November 2000

Printed in the United States of America